campaigner™

# Basic User Guide

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# Introduction

Campaigner™ is an email marketing solution that allows you to execute permission based email campaigns. You can create personalized emails containing dynamic content that deliver relevant messages to select groups of contacts. Contact segmentation and scheduling features ensure your target customers, constituents or user base will receive the right information at the right time.

## Campaigner Features

Grow Your Contacts
Successful email campaigns depend on accurate customer data, not just email addresses. Campaigner provides the tools to help you collect and updated customer information with Forward-to-a-Friend viral marketing features, List Builder forms, and Subscription Management functions.

IDENTIFY TARGET CUSTOMERS
Campaigner's advanced list search and segmentation features allow you to identify specific target groups based on their demographics and responses to past campaigns. Dynamic segments are useful when want to send a campaign to an up-to-date list of all your contacts that meet the specific segmentation criteria. A dynamic segment is created at the moment of execution of the campaign.

Send AUTOMATED, TRIGGERED, AND RECURRING CAMPAIGNS
Delivery of email campaigns can be a cumbersome and time consuming process. Campaigner's advanced scheduling can automatically send campaigns at a specific time and date, on a recurring basis, or triggered based on an action. Campaign delivery can be automated to deliver based on specific customer information (e.g. birth date), customer behaviors (e.g. opt-in to your list) or campaign requirements (e.g. clicked on a link).

Leverage Your BRANDING
Creating branded messages that are consistent with the look and feel of your other marketing efforts (whether online or offline) is critical to email communication efforts. Using Campaigner's HTML editor you can easily integrate your corporate brand into campaigns to increase your customer's familiarity with your company and its products.

## Who should read this guide?

This guide is intended for two audiences:

- All Campaigner users will find this a comprehensive resource for the operation of their Campaigner service.
- Configuration and use of the Campaigner Advanced features will be found in the Campaigner Advanced Features Guide.
- The use and configuration of the Campaigner WebServices will be found in the Campaigner WebServices Developer Guide .

# Getting Started

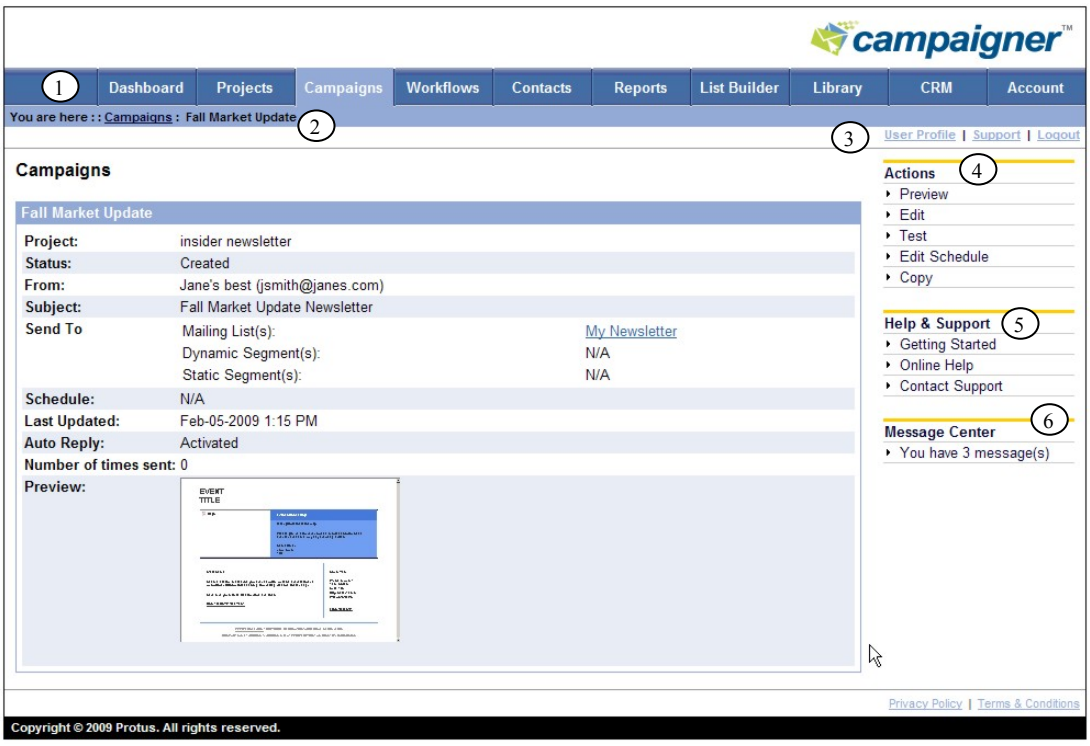
## Logging in to Campaigner

Log in to your Campaigner account at [www.campaigner.com/login.aspx](www.campaigner.com/login.aspx) .

1. **Enter** your Campaigner user name and password, and click **Login.**

Common elements on every web page of the Campaigner service are:

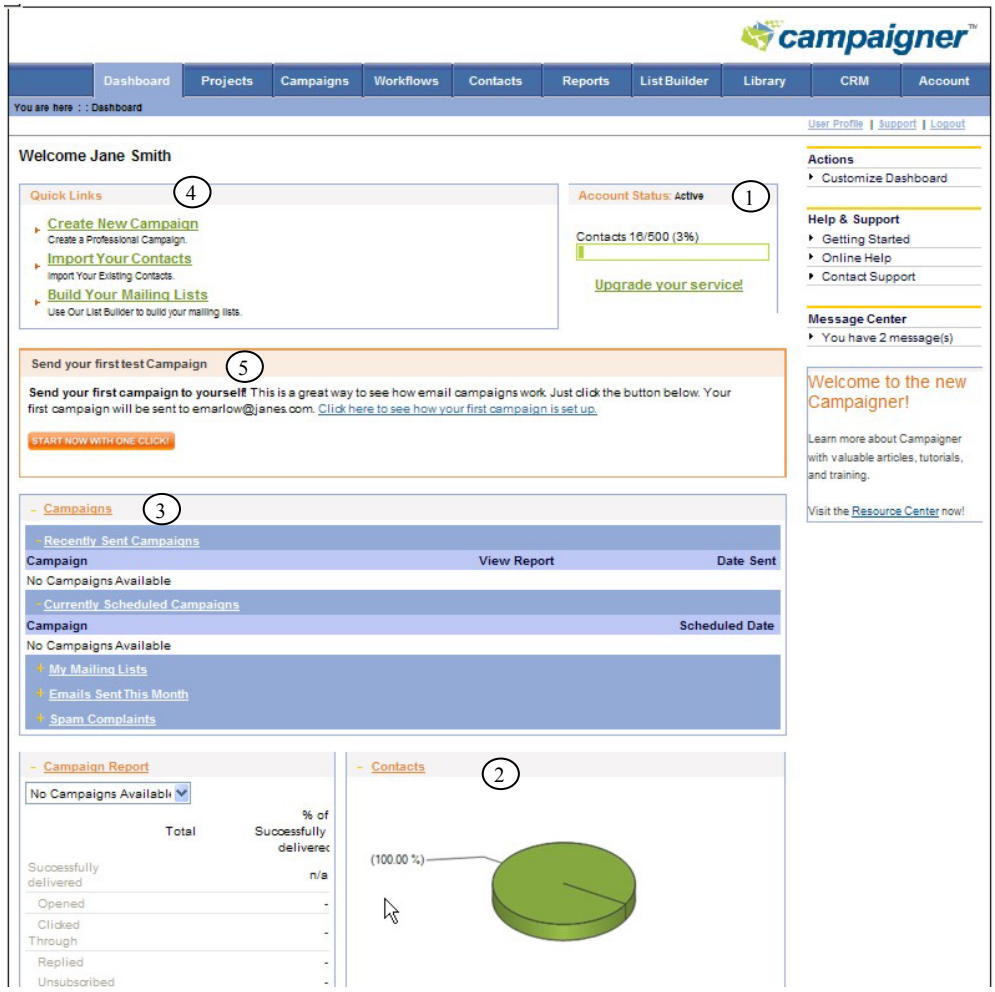
1. Navigation tabs across the top of the page to quickly move to major functions
2. Navigation "Bread Crumbs' to quickly identify where you are
3. **User Profile** and support links
4. **Actions** menu – these items change depending on the function of each page
5. **Help and Support** links
6. Your **Message Center** containing system generated messages



## Dashboard

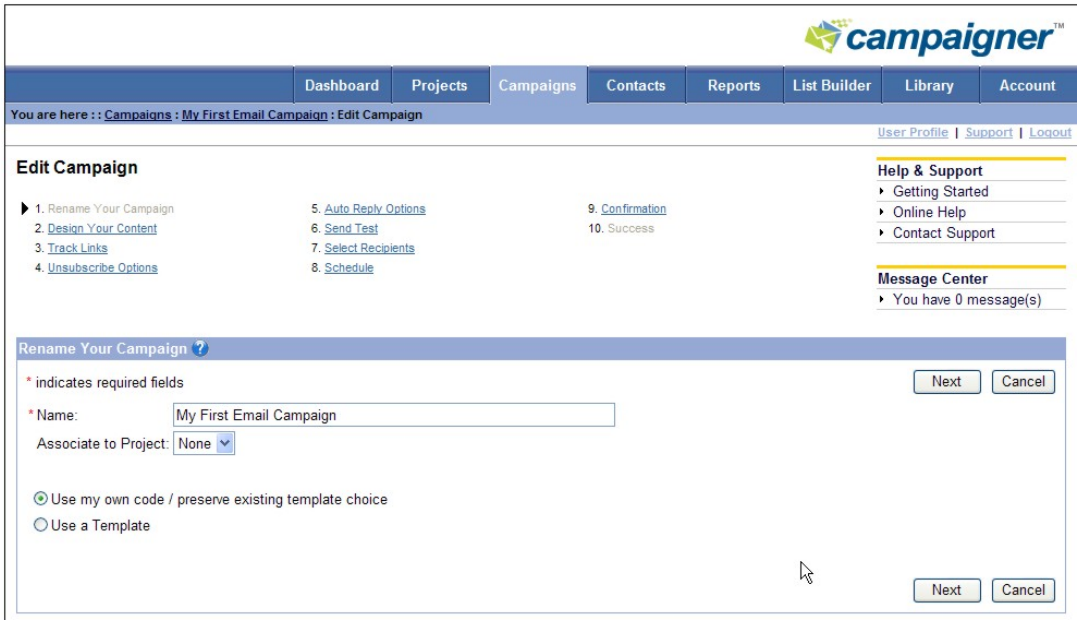
When you log in, you are directed to your Dashboard. The Dashboard displays current information about your:

1. **Account Status**
2. **Contacts** status
3. **Campaigns** status
4. **Quick Links** to frequently used services and helpful resources.
5. **Send your first test Campaign**



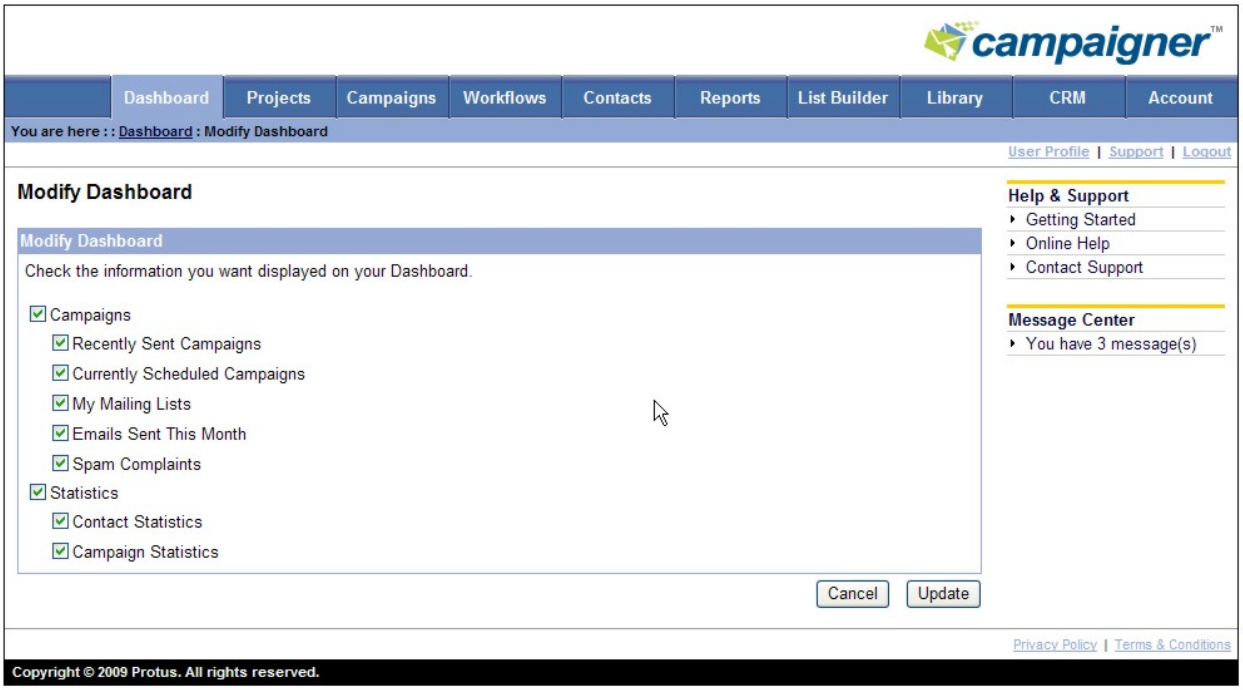

You can click on the **Start Now With One Click** button to actually send the My First Email Campaign to the administrative user's email, after which this feature will no longer be displayed.

You can also click on **Click here to see how your first campaign is set up** link to see how this campaign is set up. You can step through the Campaigns wizard by clicking the various steps with your mouse.




## Modify Your Dashboard

1. From the **Dashboard** tab, click on **Customize Dashboard** under the **Actions** menu.
2. Choose the items you wish to display on your Dashboard by selecting the checkboxes in the **Modify Dashboard** list and click the **Update** button.



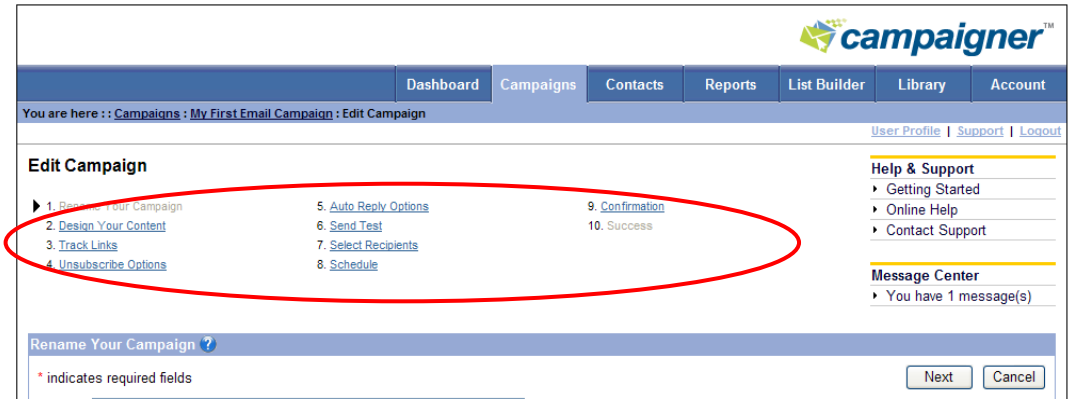
# Email Campaigns

The Home page for the **Campaigns** tab is shown below. You can expand and collapse the views of your existing campaigns, grouped according to various attributes. You can view the details of campaigns by clicking on them.

## Create and Edit Campaigns

### Campaign Wizard

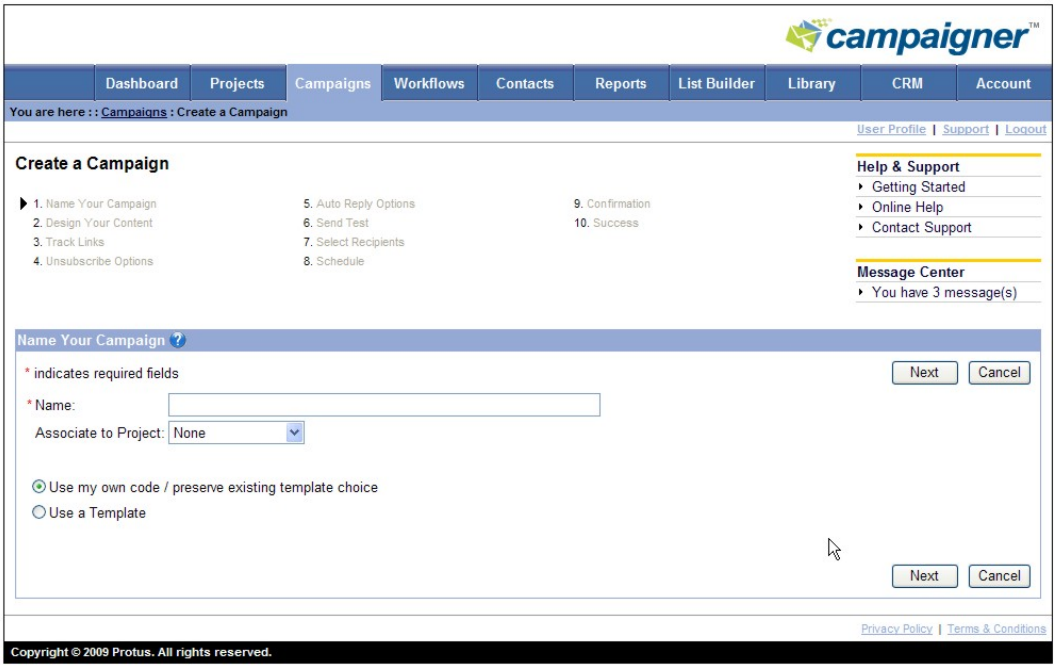
Campaigner provides a wizard to streamline the tasks required to create and manage your campaigns. The wizard walks you through the necessary steps of setting up new campaigns. You can also navigate to any stage in the wizard that is underlined and clickable with your mouse.




**Note:** *Do not use your browser's Forward and Back buttons to navigate through wizard steps. Use the* **Next** *and* **Back** *buttons.* **Cancel** *discards any changes made.*

## Create a new campaign

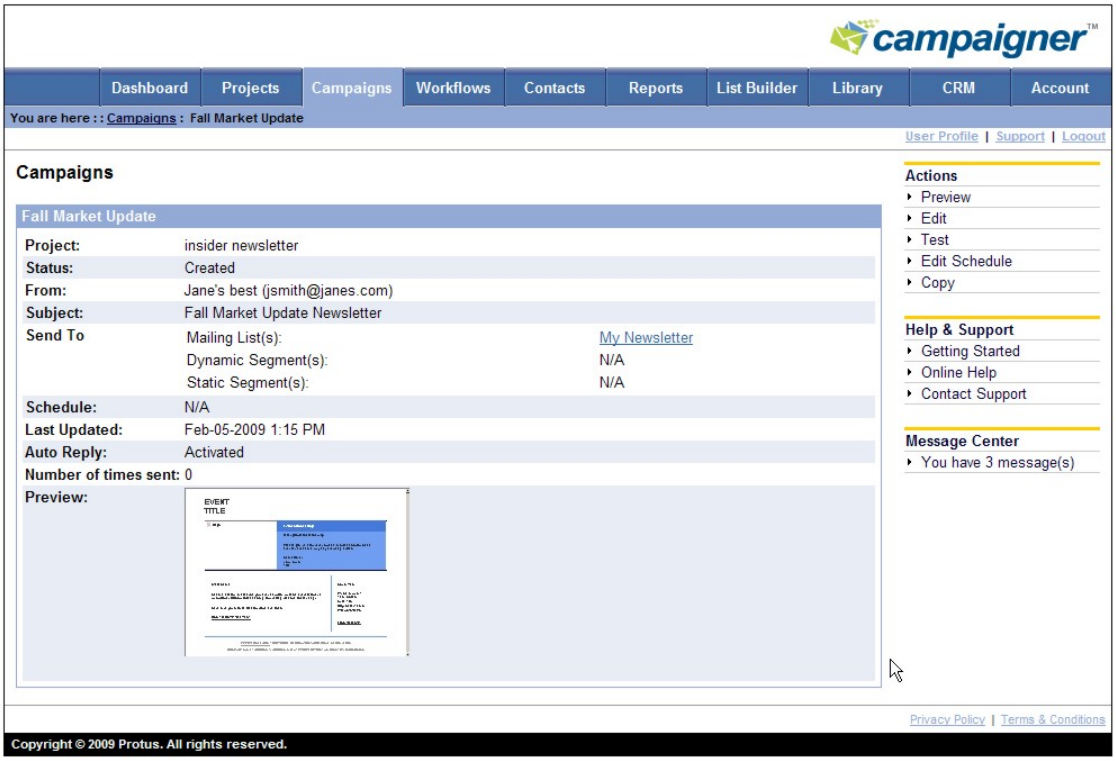
1. **Click** on **Create a Campaign** in the **Action** menu.




2. **Enter** the name of the new campaign in the **Name** field. This is not name your contacts will see in the email's subject line.
3. **Use** the radio buttons to choose to use your own HTML email file or use one of the available email templates. Templates provide the format and layout for your text and images. You can use the WYSIWYG editor in the **Design a Campaign** step of the wizard to customize the template.
4. **Click Next**. The **Design Your Campaign** page is displayed.

## Edit an existing campaign

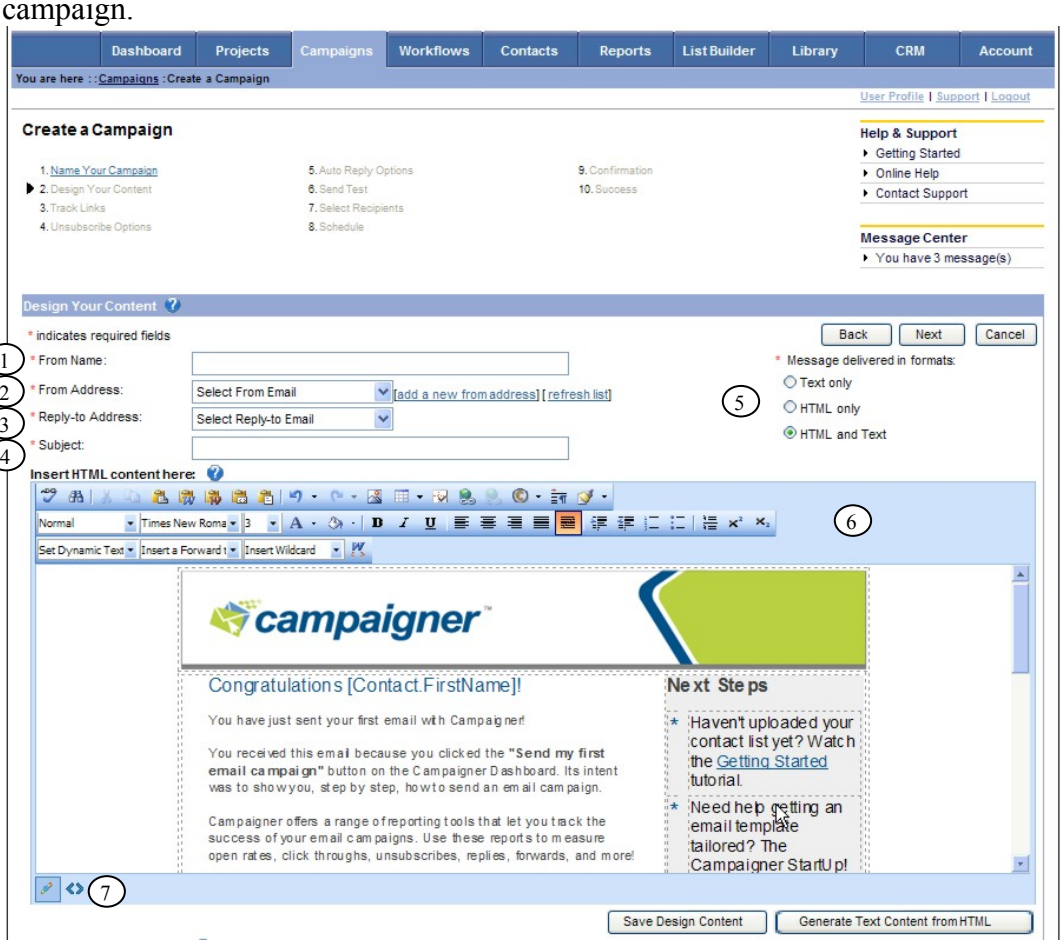
1. **Click** on a campaign's title from the **Campaigns** Home page or the Dashboard. You will see the campaigns details and various **Action** menu items.



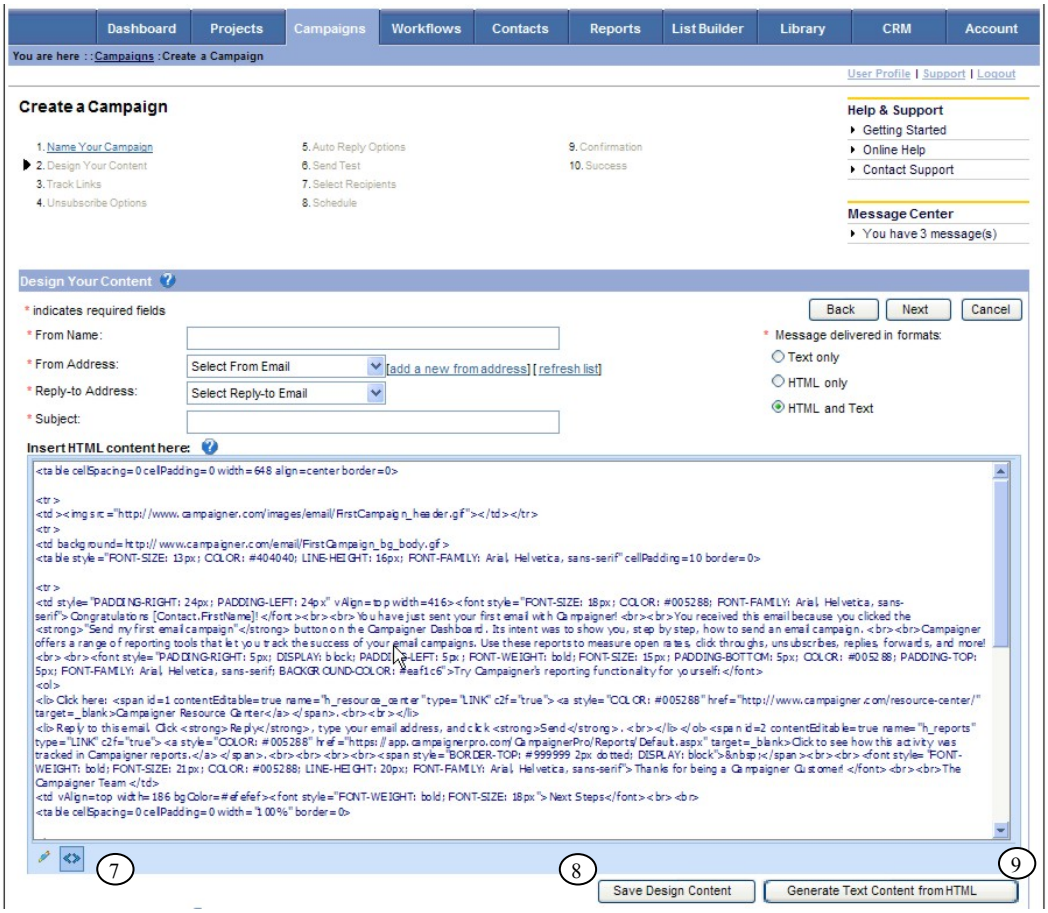

2. **Click** on the **Edit** Action. The **Rename Your Campaign** page is displayed.
3. **Change** the campaign name in the text box or choose a different email template.
4. **Click Next**. The **Design Your Campaign** page is displayed.

## Designing Your Campaign Email

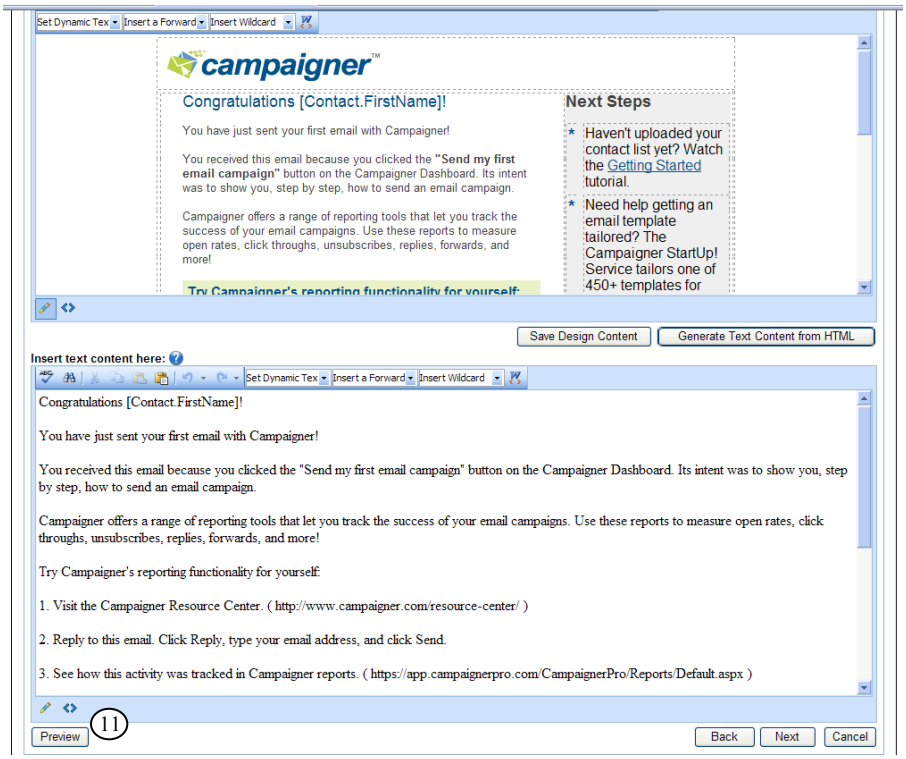
This step in the wizard allows you to define the elements of the email that will be sent out in the campaign.



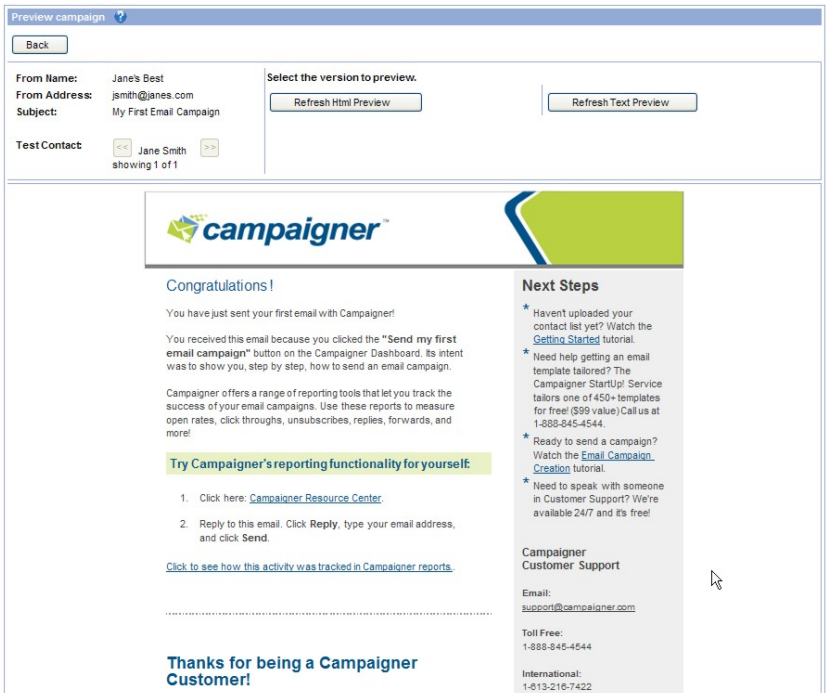

1. Enter your **From Name**. This will be seen as the sender of the email message when received by your contacts. The *Send on Behalf of* feature allows this field to be populated with contact attribute wildcards, such as [contact.Firstname].
2. Select the **From Address** from those available in the drop down list. The *Send on Behalf of* feature allows this field to be populated with the [Contact.Owner.Email] wildcard.
3. Select the **Reply To Address** from the drop down list if you want reply emails sent to a different recipient than the From Address,.
4. Enter the subject of the email in the **Subject** field. This field supports wildcards, e.g. "Jane's Newsletter for [Contact.Firstname]"
5. Choose HTML, Text, or both formats for the emails using the radio buttons.
6. Use the **WYSIWYG Editor** (what you see is what you get) to design your email's HTML content. It provides several editor tools for editing pictures, colors, text, hyperlinks, dynamic content and wildcards. Seen the next section for more information.
7. Click on the **HTML code** icon to view the code version of your HTML content. You can paste HTML code directly into the code editor. Click on the **HTML Design** icon to return to the **WYSIWYG Editor.**




8. Click on the **Save Design Content** to save your changes
9. Click on the **Generate Text Content from HTML** button to automatically generate a text version of the HTML content.
10. Click on the **Revert to template HTML** button to undo your changes and go back to the original template's design.
11. Click the **Preview** button at any time during the design process.


Set Dynamic Tex
Insert a Forward
Insert Wildcard
campaigner
Congratulations [Contact.FirstName]!
You have just sent your first email with Campaigner!
You received this email because you clicked the "Send my first email campaign" button on the Campaigner Dashboard. Its intent was to show you, step by step, how to send an email campaign.
Campaigner offers a range of reporting tools that let you track the success of your email campaigns. Use these reports to measure open rates, click throughs, unsubscribes, replies, forwards, and more!
Try Campaigner's reporting functionality for yourself:
Next Steps
Haven't uploaded your contact list yet? Watch the Getting Started tutorial.
Need help getting an email template tailored? The Campaigner StartUp! Service tailors one of 450+ templates for
Save Design Content
Generate Text Content from HTML
Insert text content here:
Congratulations [Contact.FirstName]!
You have just sent your first email with Campaigner!
You received this email because you clicked the "Send my first email campaign" button on the Campaigner Dashboard. Its intent was to show you, step by step, how to send an email campaign.
Campaigner offers a range of reporting tools that let you track the success of your email campaigns. Use these reports to measure open rates, click throughs, unsubscribes, replies, forwards, and more!
Try Campaigner's reporting functionality for yourself:
1. Visit the Campaigner Resource Center. ( http://www.campaigner.com/resource-center/ )
2. Reply to this email. Click Reply, type your email address, and click Send.
3. See how this activity was tracked in Campaigner reports. ( https://app.campaignerpro.com/CampaignerPro/Reports/Default.aspx )
Preview
11
Back
Next
Cancel

The **Preview** function allows you to preview your campaign email content. You can select between an HTML or text preview. To preview your message personalization click on the << >> buttons to scroll between the test contacts you have flagged in your Contact List using the **Receives Test Messages** attribute. The personalized data will be updated with each test contact's unique information. Click the **Back** button to exit.


Preview campaign
Back
From Name: Jane's Best
From Address: jsmith@janes.com
Subject: My First Email Campaign
Test Contact: Jane Smith
showing 1 of 1
Select the version to preview.
Refresh Html Preview
Refresh Text Preview
campaigner
Congratulations!
You have just sent your first email with Campaigner!
You received this email because you clicked the "Send my first email campaign" button on the Campaigner Dashboard. Its intent was to show you, step by step, how to send an email campaign.
Campaigner offers a range of reporting tools that let you track the success of your email campaigns. Use these reports to measure open rates, click throughs, unsubscribes, replies, forwards, and more!
Try Campaigner's reporting functionality for yourself:
1. Click here: Campaigner Resource Center.
2. Reply to this email. Click Reply, type your email address, and click Send.
Click to see how this activity was tracked in Campaigner reports.
Thanks for being a Campaigner Customer!
Next Steps
Haven't uploaded your contact list yet? Watch the Getting Started tutorial.
Need help getting an email template tailored? The Campaigner StartUp! Service tailors one of 450+ templates for free! ($99 value) Call us at 1-888-845-4544.
Ready to send a campaign? Watch the Email Campaign Creation tutorial.
Need to speak with someone in Customer Support? We're available 24/7 and it's free!
Campaigner Customer Support
Email: support@campaigner.com
Toll Free: 1-888-845-4544
International: 1-613-216-7422

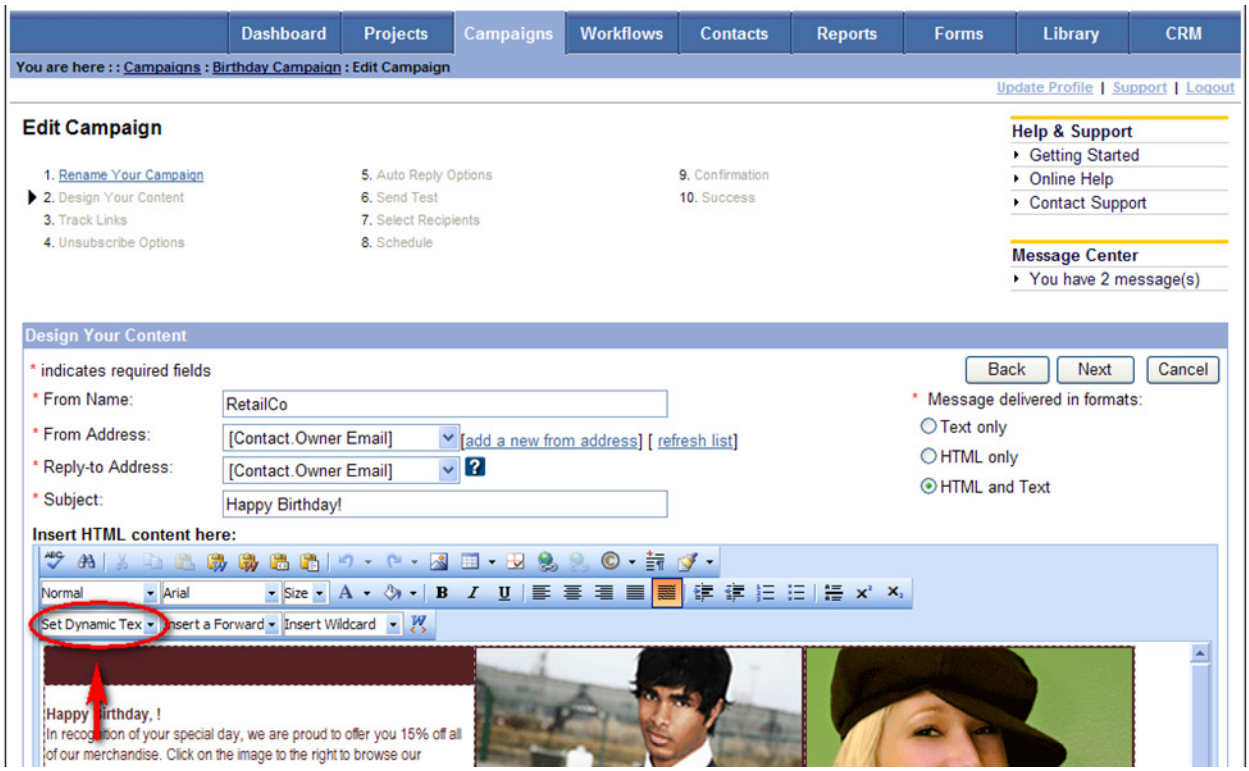
12. Click the **Next** button when satisfied. The **Track Links** page is displayed.

## Dynamic Content & Personalization

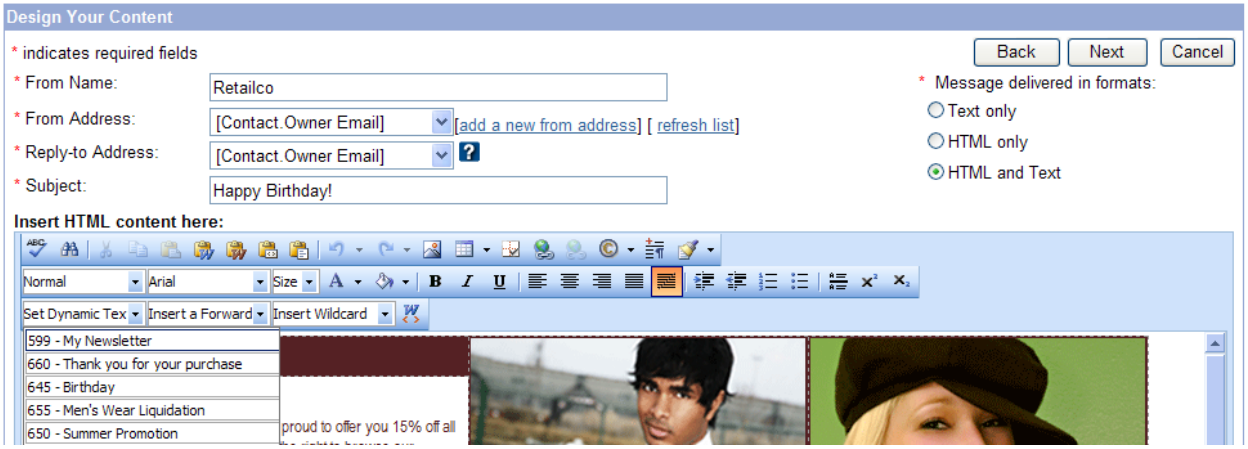
Dynamic Content and Personalization allows groups of recipients to receive targeted email campaigns.

### Dynamic Content Blocks

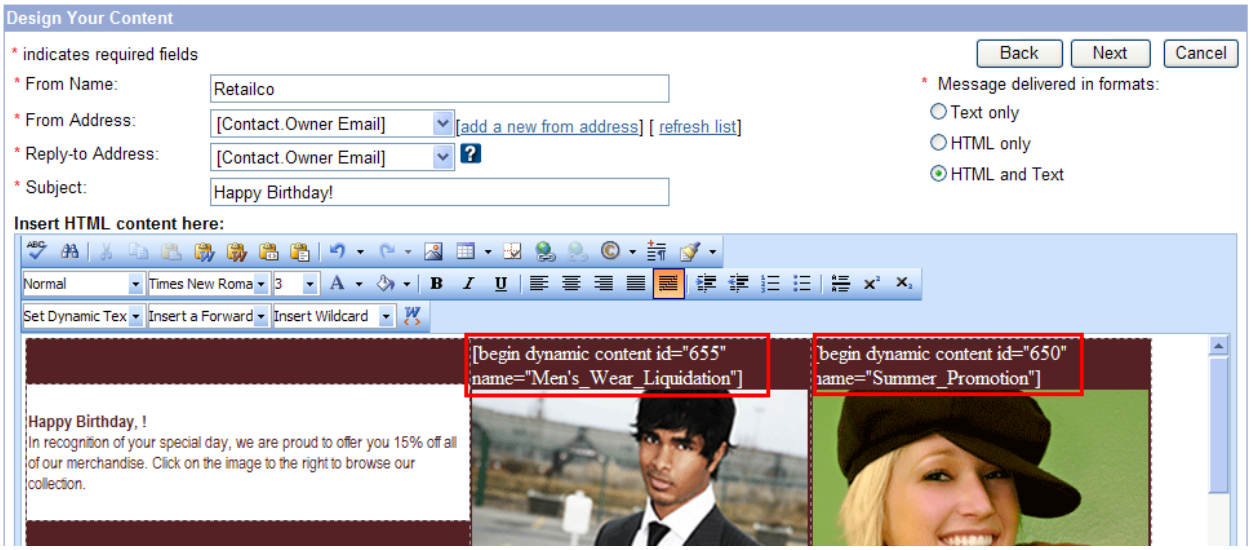
The dynamic content block functions available in the **HTML Editor** allow you to design and deliver personalized communications. Dynamic content blocks can include images, text or other rich media content.




1. **Highlight** text, images or content in the editor that you would like to make dynamic with the mouse.
2. **Click** on the **Set Dynamic Text** dropdown list. A dropdown list displays your mailing lists and segments.



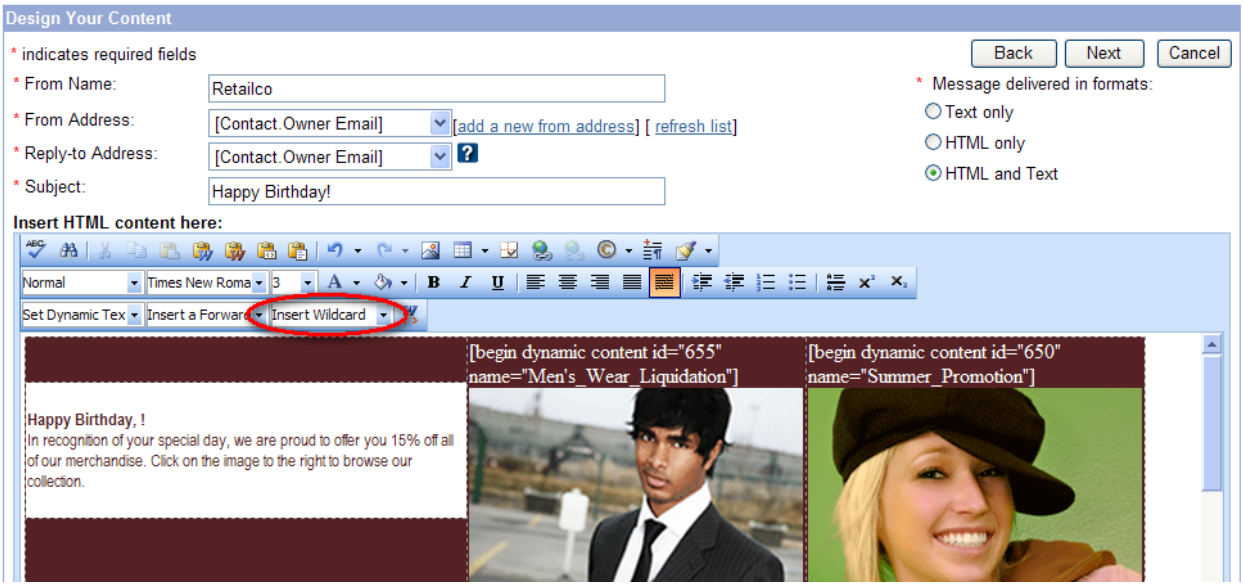

3. **Select** the segment or mailing list which will be able to view this content. Bracketed references have been inserted before and after the content you had selected. These references tell indicate that it is dynamic content and it should only appear in messages that are being delivered to the segment or mailing.



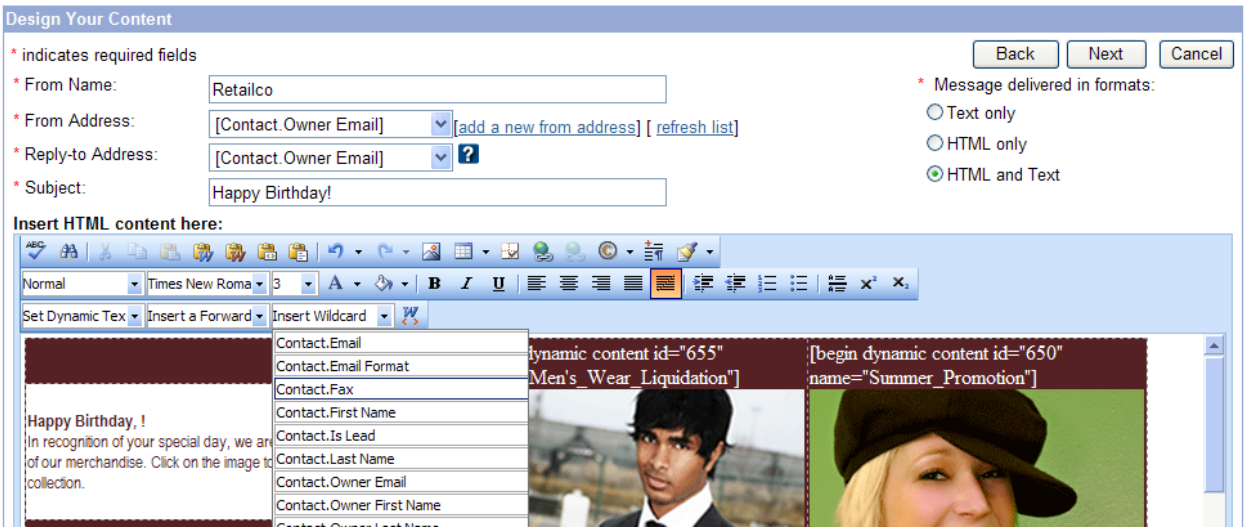

**Note**: Preview and test all possible versions of the message to ensure the content is accurate for all mailing lists or segments.

## Personalization Wildcards

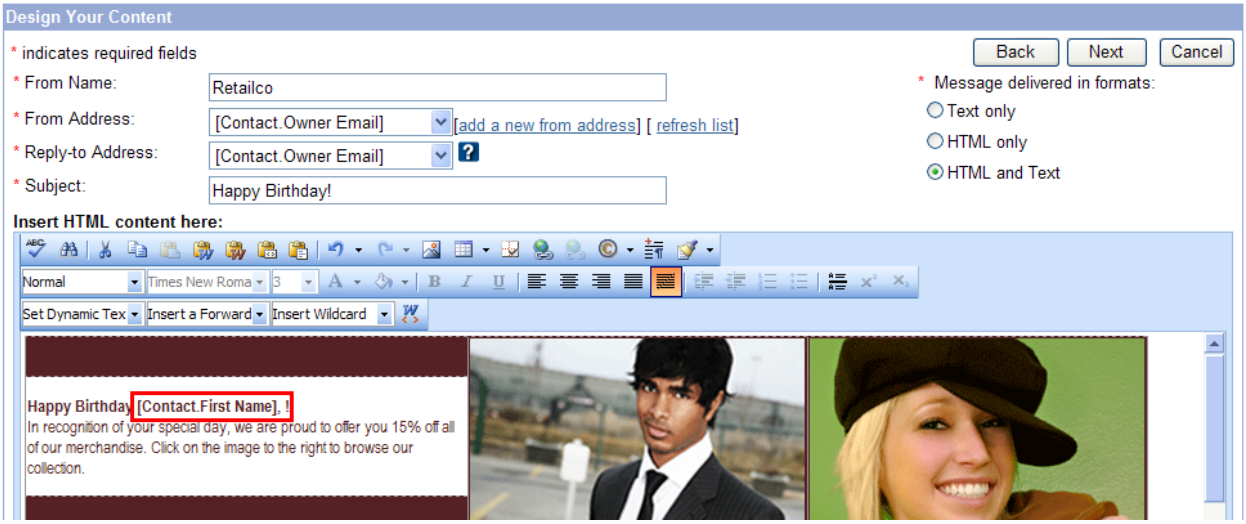
Personalization wildcards work with dynamic content blocks to create a true one-to-one feel. You can insert contact-specific information into your email campaign, such as the contact's first name, phone number, or email address.




1. Place your cursor at the location in the email where you would like the personalization wildcard inserted.
2. Click on the **Insert Wildcard** dropdown menu. A list of all possible personalization elements is displayed. These elements relate to contact list attributes such as first name, last name, birthday, address, etc.



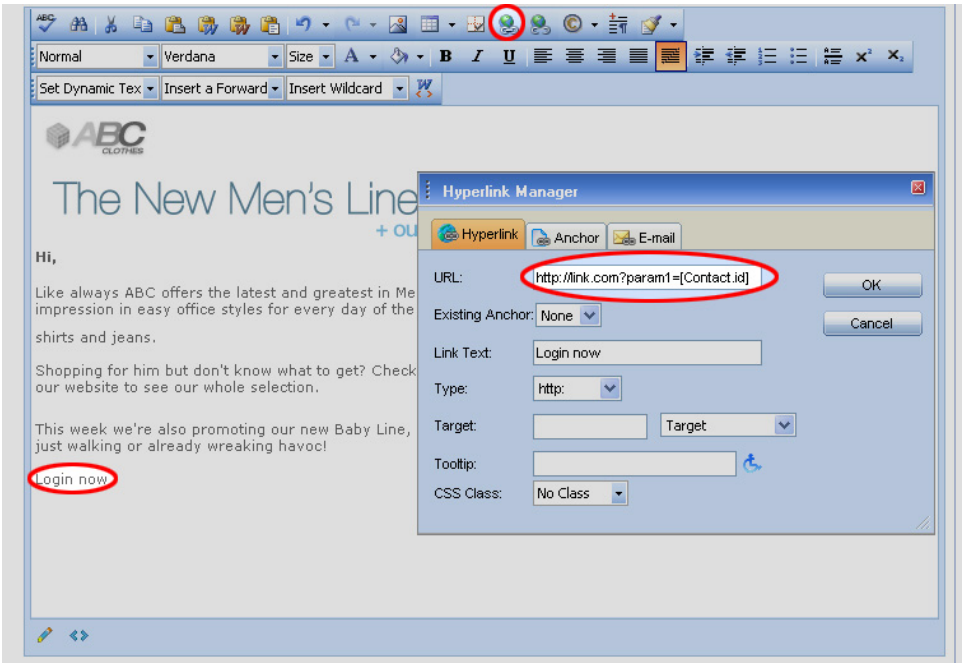

3. The bracketed personalization wildcard is inserted into the message. These references indicate that this field will be updated with the associated attribute information for each contact when the campaign is sent.




To insert personalization wildcards into trackable links:

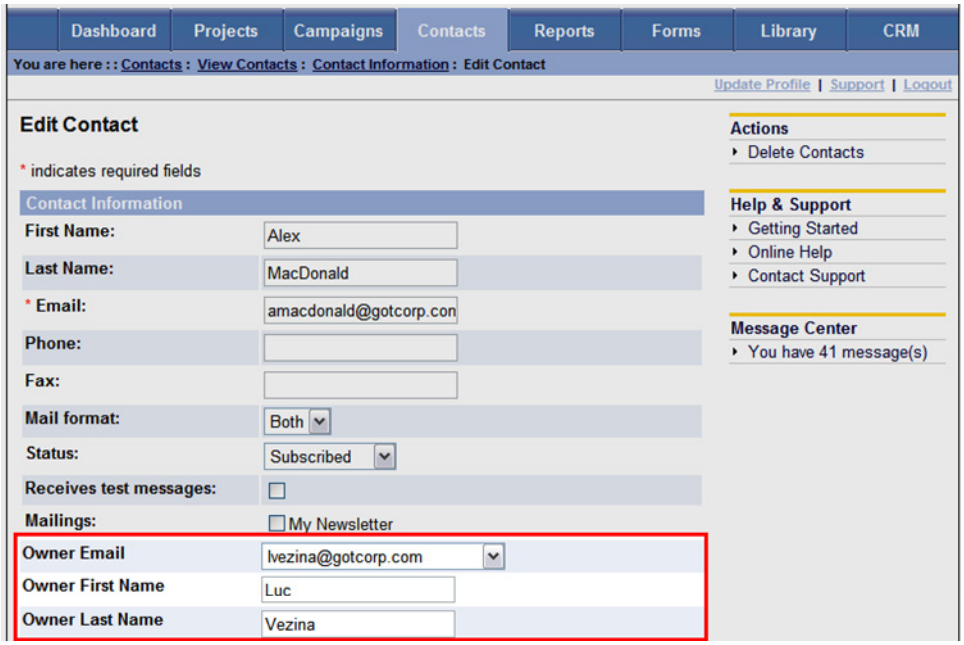
1. In the HTML version of the message, **highlight** the text that should be the link.
2. **Click** on **Hyperlink Manager** icon
3. **Enter** the hyperlink with the wildcards. The wildcards are represented by [Contact.xxxx] where xxxx is the name of the contact's attribute. Note that "Contact" and the attribute name is case sensitive.
4. **Click OK**. The link is now set.

To add wildcards to a link in the text version, simply write out the link including the wildcards.



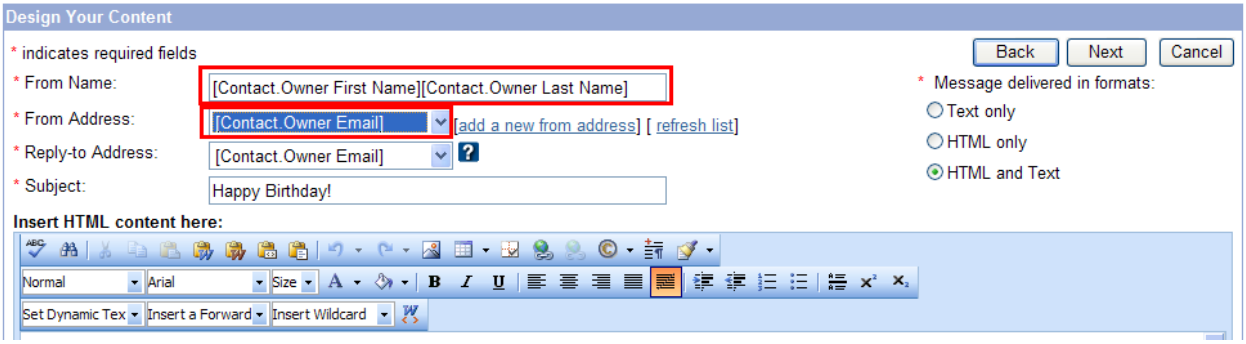
## Send on Behalf

The *Send on Behalf* feature allows wildcards to be inserted in both the **From Name** and **From Address** so that one email campaign can appear to be sent from many different people. All replies to the campaign will be routed to the proper contact owner.
Three attributes are automatically included in your account for your convenience: Owner Email, Owner First Name, and Owner Last Name.



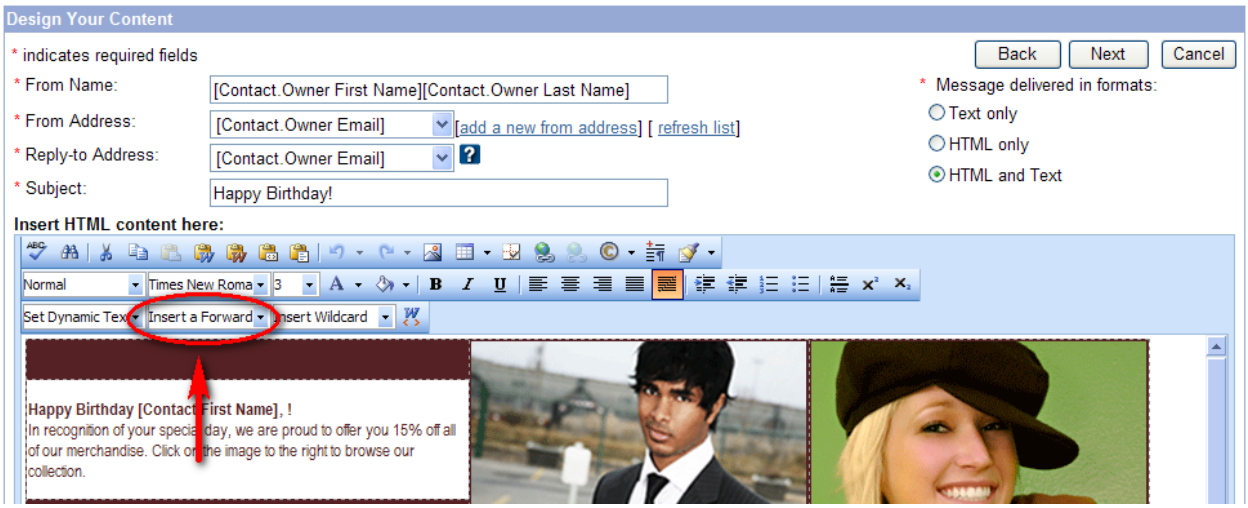

**Note:** The default value of the Owner Email field cannot be blank – it must be a validated **From Address**.

Owner Email can become a campaign's From Address by selecting it from the list of validated **From Addresses**. Any attribute can be represented as a wildcard in the **From Name**. The syntax used to enter the wildcard can be obtained from the **Insert Wildcard** dropdown menu.

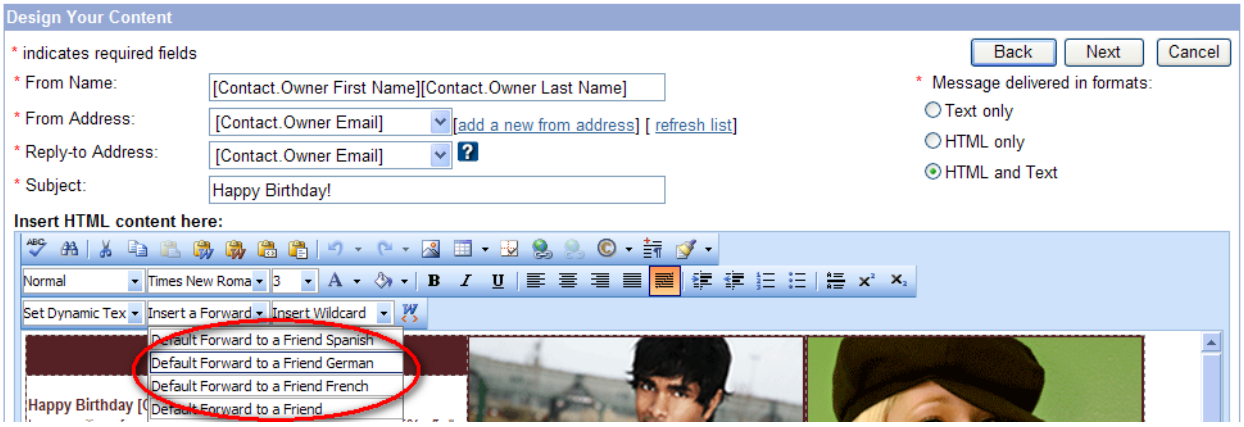


## Forward-to-a-Friend Links

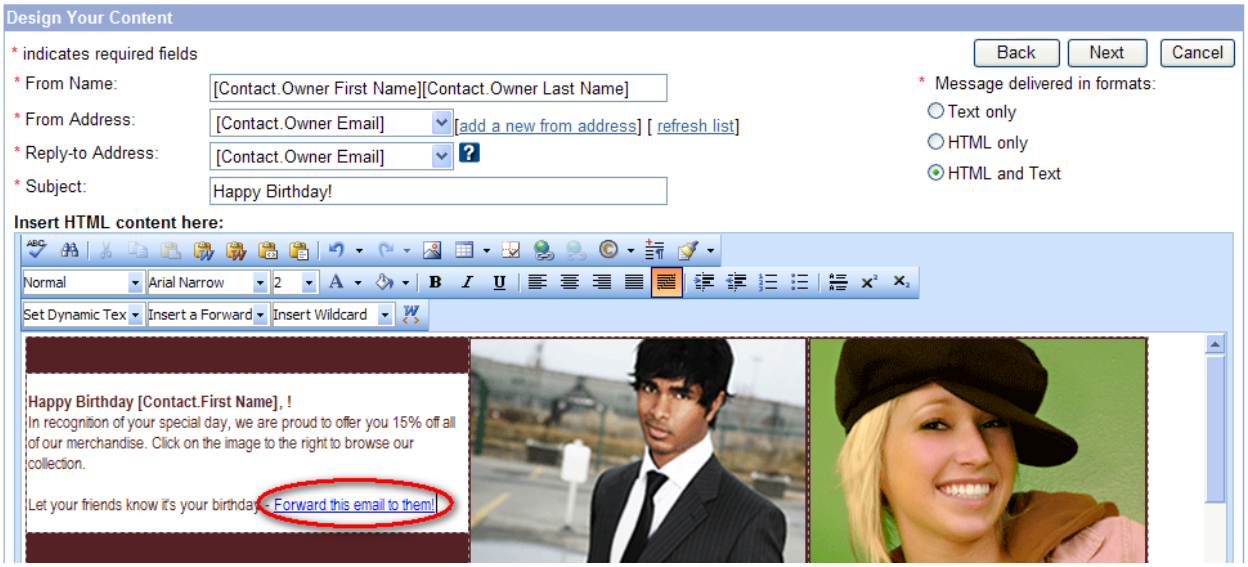
**Forward-to-a-Friend** links give your contacts the ability to quickly pass along a campaign to their friends and helps you expand your list of contacts.




1. **Highlight** the text you would like the email recipient to click on to forward the message to a friend.
2. **Click** on the **Insert a Forward** dropdown list.

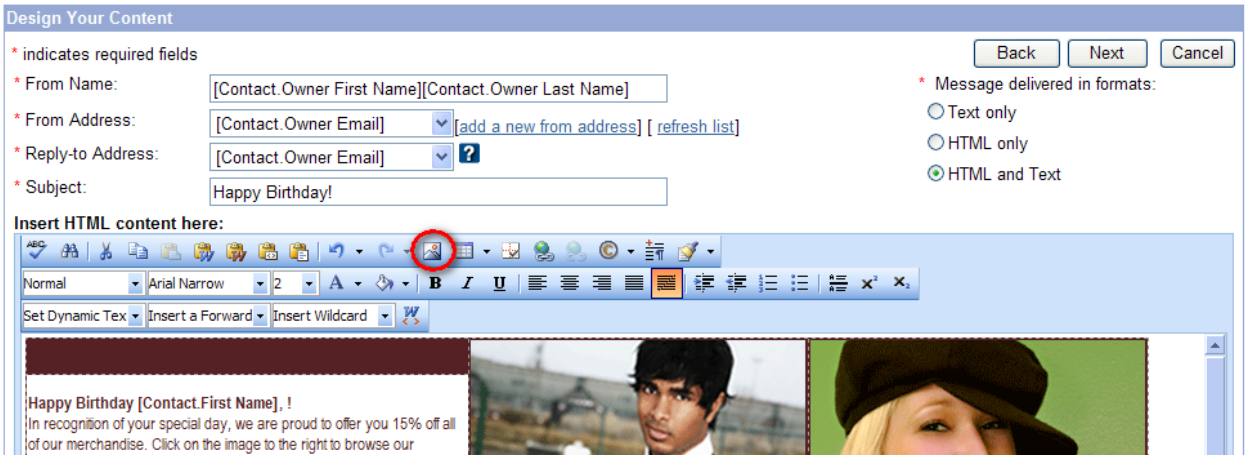



3. Choose the **Forward-to-a-Friend** page you would like to display when the user clicks on the link.

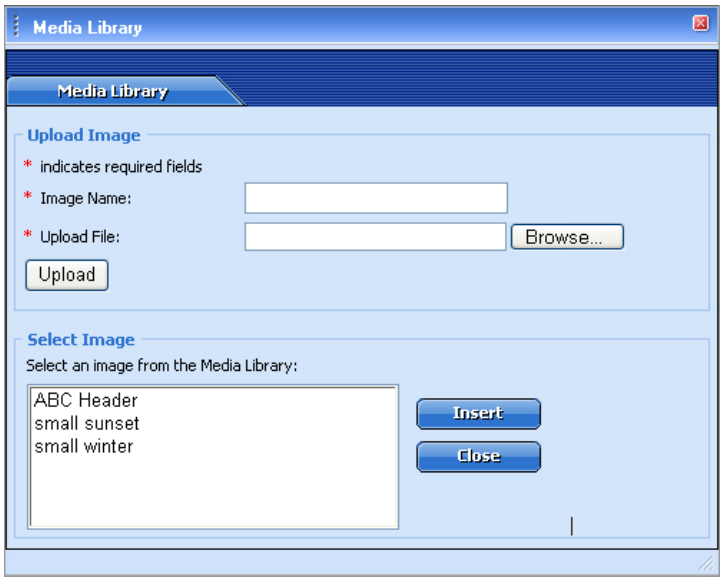

Design Your Content
* indicates required fields
Back
Next
Cancel
* From Name:
[Contact.Owner First Name][Contact.Owner Last Name]
* From Address:
[Contact.Owner Email]
[add a new from address] [ refresh list]
* Reply-to Address:
[Contact.Owner Email]
* Subject:
Happy Birthday!
* Message delivered in formats:
Text only
HTML only
HTML and Text
Insert HTML content here:
Normal
Arial Narrow
2
Set Dynamic Tex
Insert a Forward
Insert Wildcard
Happy Birthday [Contact.First Name], !
In recognition of your special day, we are proud to offer you 15% off all of our merchandise. Click on the image to the right to browse our collection.
Let your friends know it's your birthday - Forward this email to them!

## Inserting Images from the Image Library

Images are stored in your **Image Library** for use in your email campaigns.




1. Place your cursor at the location within the email where you would like the image inserted.
2. Click on the **Access Media Library** icon. The **Media Library** window is displayed.

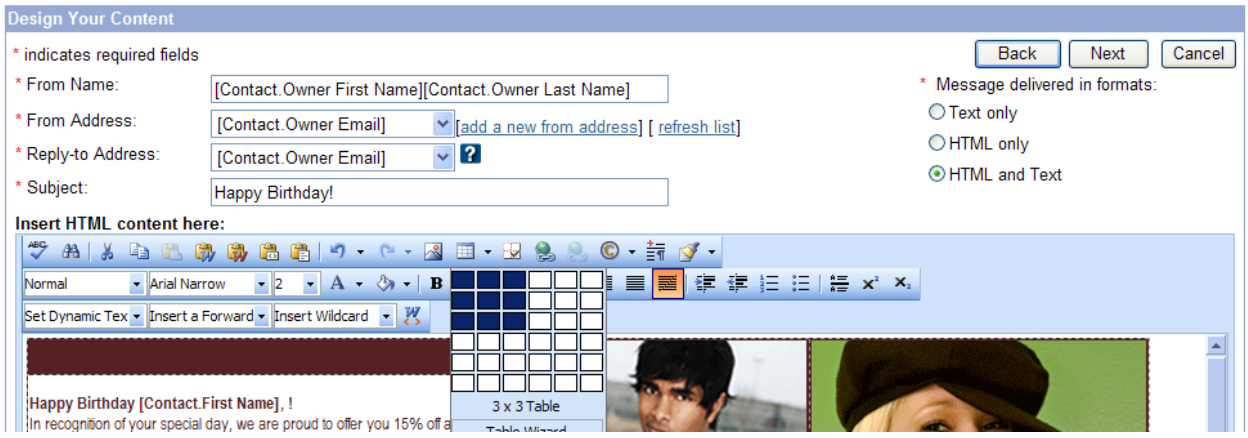


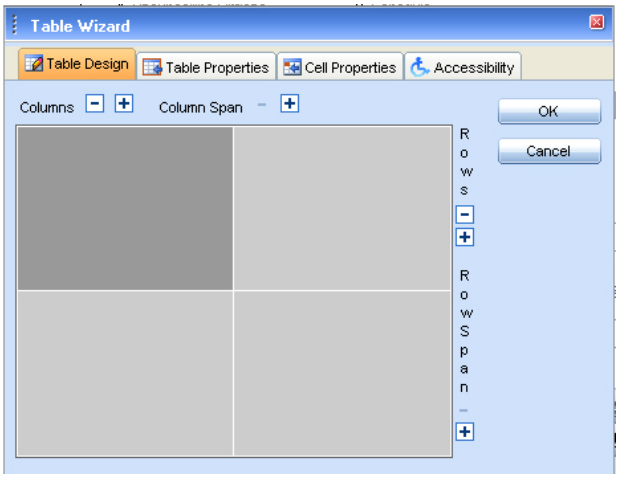

3. **Select** the image you would like to insert from the **Select Image** box.
4. **Click Insert** to place the image in the email.

## Inserting Tables into Campaigns

1. **Place** your cursor where you would like to insert the table.
2. **Click** on the **Insert Table** icon.
3. **Highlight** the cells that quickly outline the table (by rows and columns) to insert into your campaign, or select the Table Wizard.

**Note**: You can right click on the table after you have inserted it into the **HTML Editor** to adjust Table Properties.






The **Table Wizard** allows you to format the table with greater detail. It consists of four tabs:

| Tab | Use |
|---|---|
| Table Design | Define the number of rows and columns of your table. |
| | Select a cell and use the column/row span function to merge it with other adjacent cells. |
| Table Properties | Align your table within the HTML editor |
| | Define cell spacing and padding |
| | Define the dimensions (height and width) of your table |
| | Set table background color or image |
| | Define table borders |
| | Use "Id" for JavaScript and DHTML |
| Cell Properties | Align your content within cells |
| | Define the dimensions (height and width) of cells |
| | Set cell background color or image |
| | Insert content into cells |
| | Use "Id" for JavaScript and DHTML |
| Accessibility | Associate a number of rows and columns with the heading. |
| | Create a caption or summary |
| | Set the caption alignment |
| | Associate cells with a header |

## Inserting Hyperlinks into Campaigns

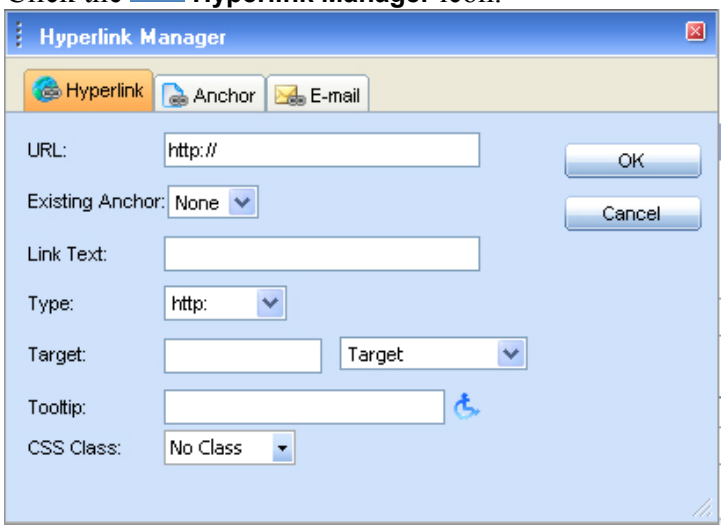
CampaignerPro supports insertion of three types of hyperlinks:

- An external web page (URL) or document
- A specific area within the campaign
- An email addresses

To link to a URL:

1. Highlight the text in campaign you would like to become a hyperlink.

2. Click the **Hyperlink Manager** icon.



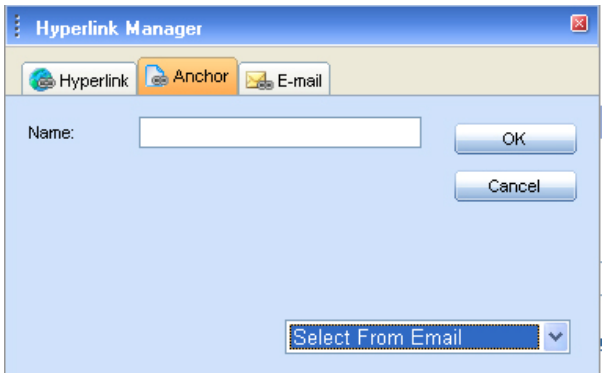

3. Enter the location in the **URL** field.
4. Select the protocol **Type** from the dropdown list.
5. Select the **Target** from the drop down list to specify how the web page or file will be displayed:

| Target Type | Description |
|---|---|
| New Window | Opens the linked web page/document into a new blank window. This window is not named. |
| Parent Window | Opens the linked web page/document into the immediate parent of the web page/document containing the link. |
| Same Window | Opens the linked web page/document into the same window as the link (the active window). |
| Browser Window | Opens the linked web page/document into the topmost window. |
| Search Pane | Opens the linked web page/document into the browser's search pane (for display only in IE 5.0 and higher). |
| Media Pane | Opens the linked web page/document into the browser's media pane (for display only in IE 6.0 and higher). |

6. Enter a **Tooltip** text. This information is displayed when the recipient's mouse hovers over the link.
7. Click **OK**.

To link to a specific area of the campaign:

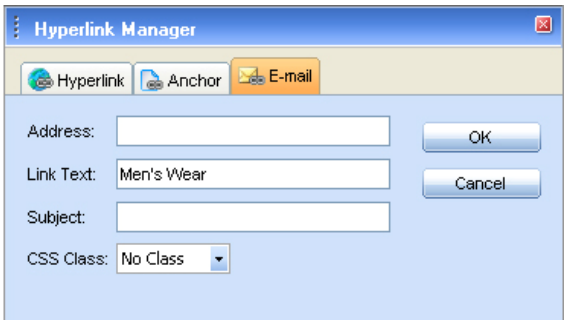
1. **Highlight** the text in campaign to which you would like to link.
2. **Click** the **Hyperlinks Manager** icon.
3. **Click** on the **Anchor** tab.




4. **Enter** a name for the anchor ("Anchor1", for example).
5. **Click OK**. An anchor has been created.
6. **Highlight** the text in campaign you would like to link to the anchor.
7. **Click** the **Hyperlinks Manager** icon.
8. **Select other** in the **Type** dropdown.
9. In the **URL** field **enter** the '#' followed by the anchor name ("#Anchor1", for example).
10. **Click OK**.

To insert a link to launch an email:

1. **Highlight** the text you would like to become the email link.
2. **Click** the **Hyperlinks Manager** icon.
3. **Click** on the **Email** tab.



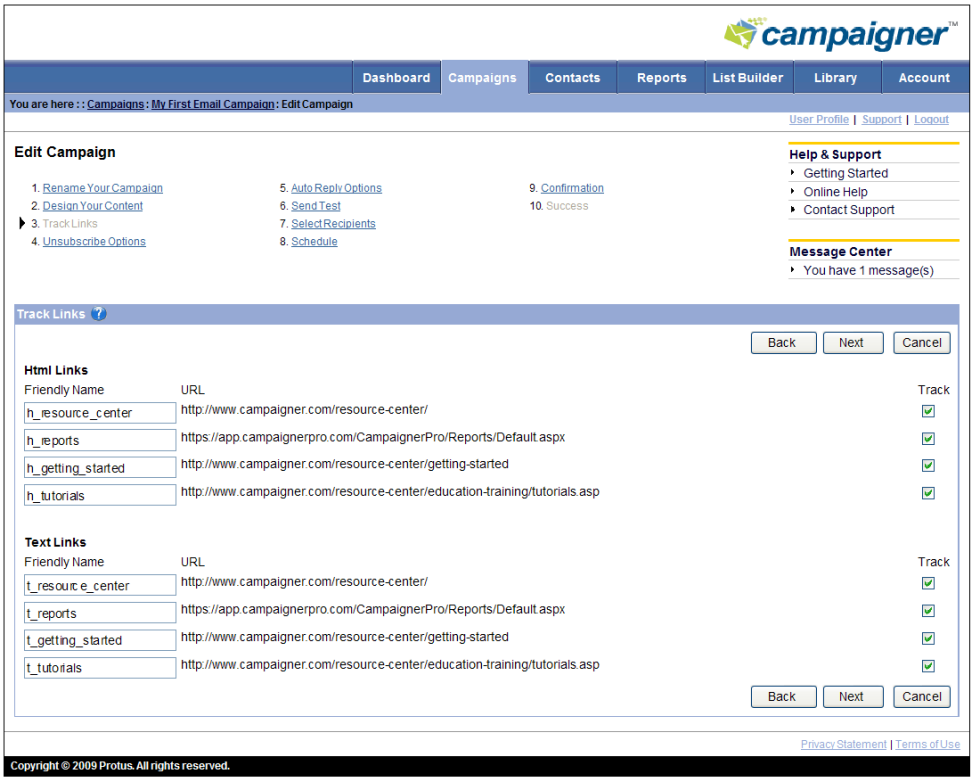

3. **Enter** the email **Address** to where the message will be sent.
3. **Enter** the **Subject** of the email message.
4. **Click OK**

## Campaign Options

### Track URL Links

1. **Select** the links from your email message that you would like to track in campaign reports. This feature allows you to track and report on the links your email recipients have clicked on. You give each link a "friendly name" that will make it easier to distinguish between URLs in the

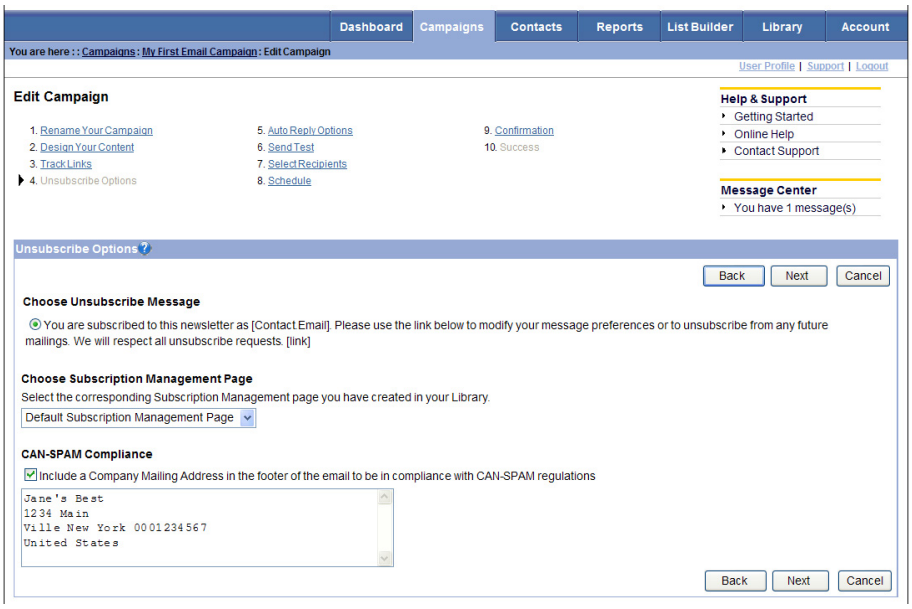
report. Two identical links in a campaign will be tracked with unique names, for text and HTML emails.




2. Click the **Next** button. The **Unsubscribe Options** page is displayed.

## Unsubscribe Options

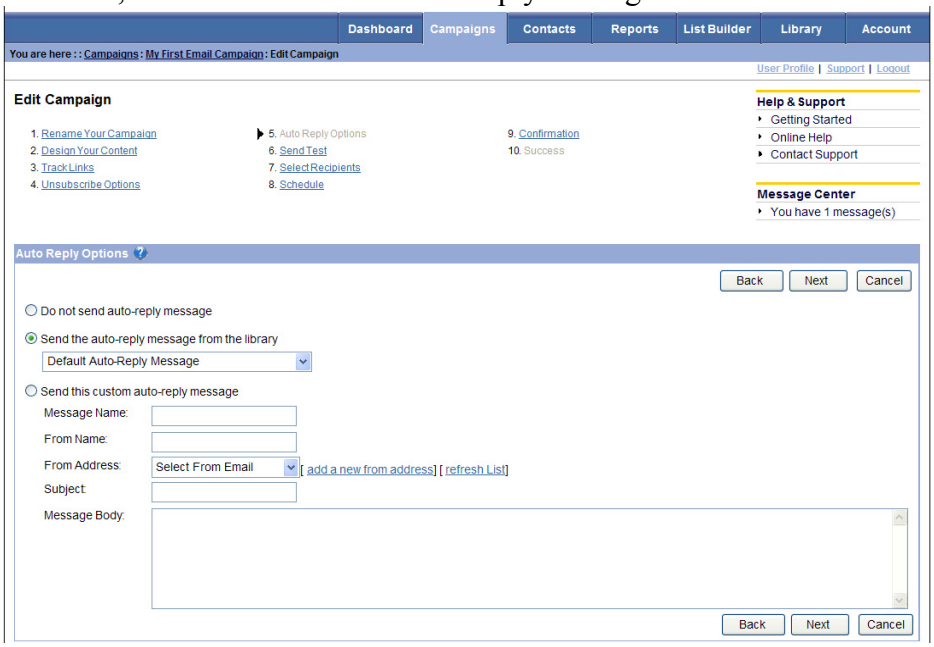
1. The radio buttons select the unsubscribe message that will be used in your campaign. All campaigns sent by Campaigner contain an unsubscribe message. This helps to ensure that your campaigns are permission-based, providing an easy opt-out for contacts and avoids a SPAM label.




2. Select the **Subscription Management** page to which your contacts will be redirected. Subscription Management Pages are stored in your Library and will be listed in the dropdown list.
3. To ensure CAN-SPAM regulatory compliance, select the check box to insert your company's mailing address in the campaign email footer. You can type a different address directly in the space provided.
4. Click the **Next** button. The **Auto Reply Options** page is displayed.

## Auto-Reply Options

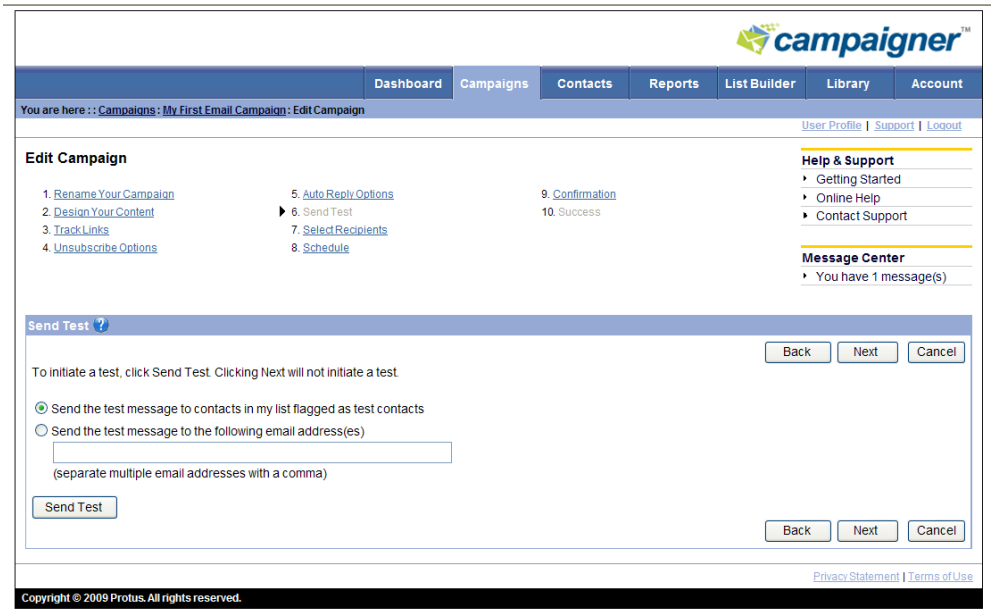
1. Use the radio buttons to choose an auto reply message from your Library, as listed in the drop down list, or to create a custom auto-reply message.



2. Click the **Next** button. The **Send Test** page is displayed.

## Campaign Testing

3. Choose whether or not to send this campaign to a test group of contacts. You can send a test to the predetermined list of test contacts or specify a list of email addresses in the textbox. Test contacts have the Contact attribute "**Receives Test Messages**" set to **YES**



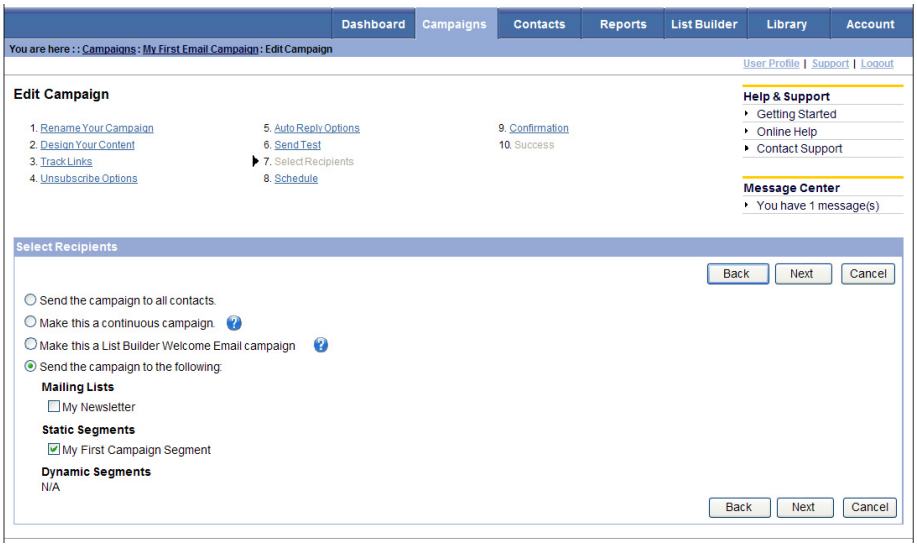

1. Click on the **Send Test** button if you wish to send to the test contacts. Click the **Next** button to skip the test.

**Note**: Your test campaign cannot be personalized with dynamic content when providing a list of email addresses. Campaigner cannot customize the message for the recipient without access to contact attributes. Each email address is sent the first test contact's version of the campaign. The first test contact must have their email preference set to "both" in order to send both HTML and text versions. The test contacts' order is determined by date added to the contact list.

2. Click the **Next** button. The **Select Recipients** page is displayed.

## Choosing Campaign Recipients

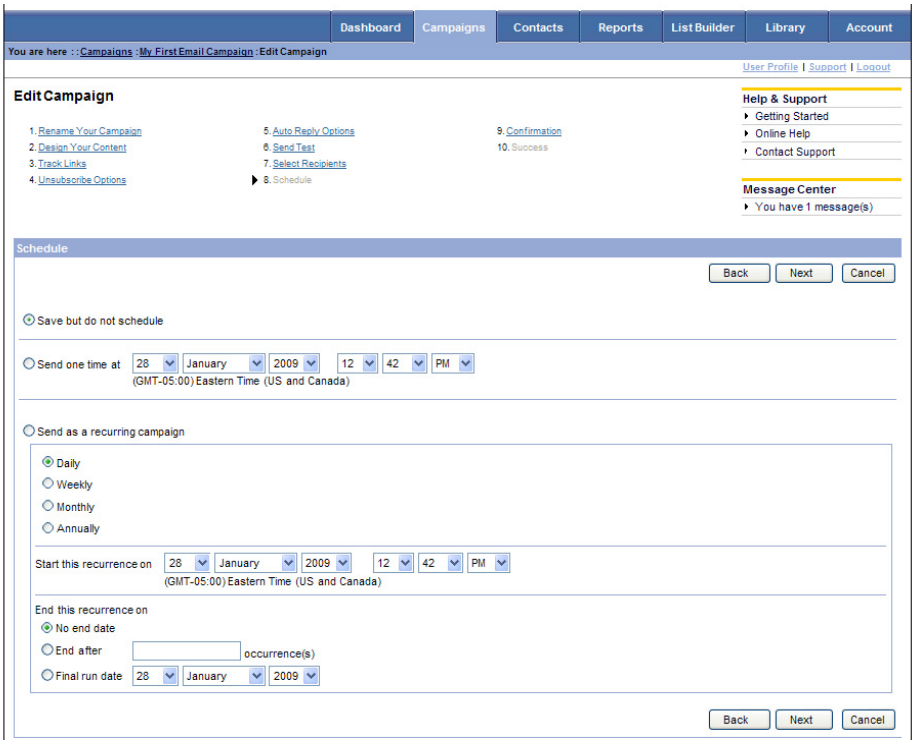
1. Choose to send the campaign to all or your contacts, to a specific mailing list or segment, or designation this campaign for the List Builder Welcome email. If Workflows is enabled in your account, you also have the option to designate this to be a continuous campaign.



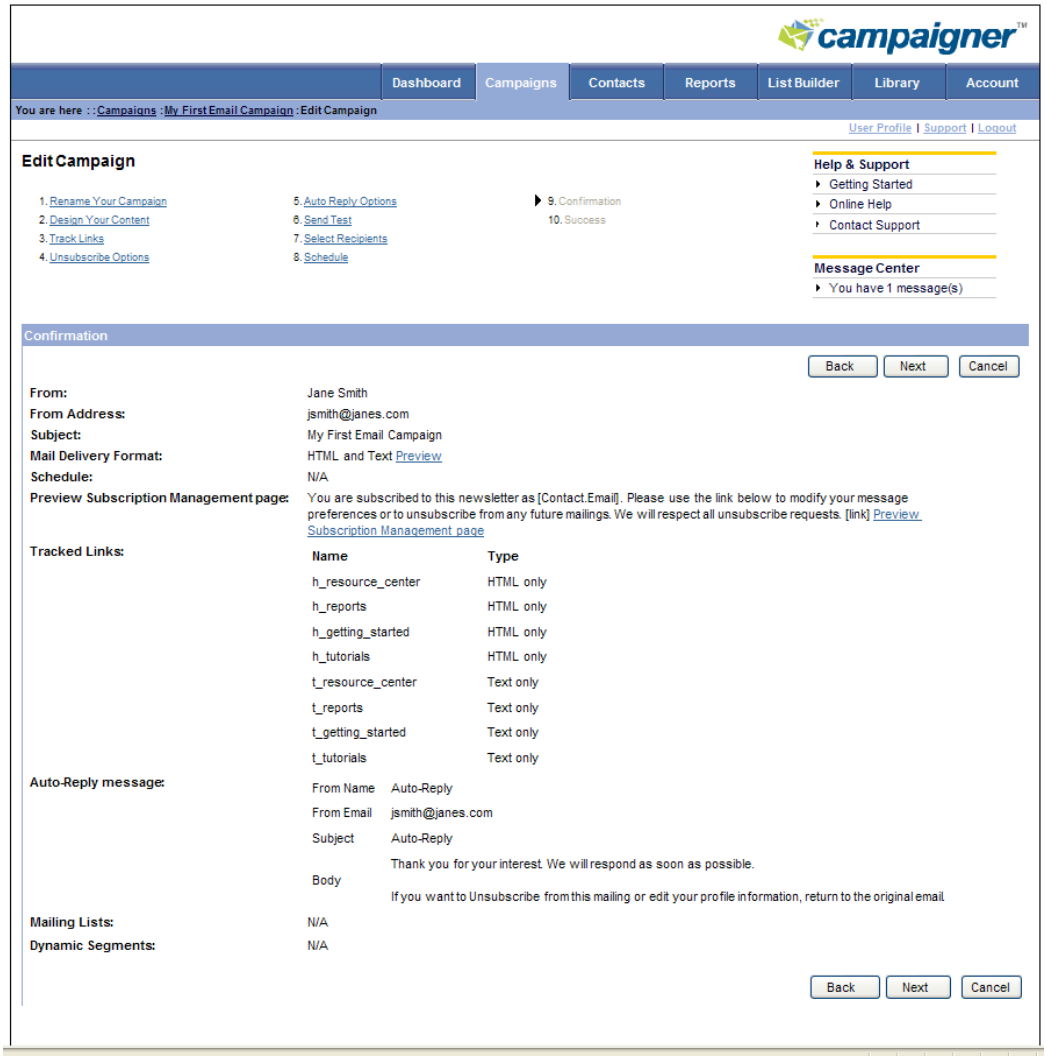

2. Click the **Next** button. The campaign's **Schedule** page is displayed.

## Scheduling Campaigns

1. Choose whether you want to save the campaign but not schedule it, send it one time only, or send it as a recurring campaign. If sending the campaign only once, enter the date and time the campaign is going to be sent. If a recurring campaign is chosen, pick how often the campaign will resend and how long the recurrence will last.




2. Click the **Next** button. A **Confirmation** page is displayed.

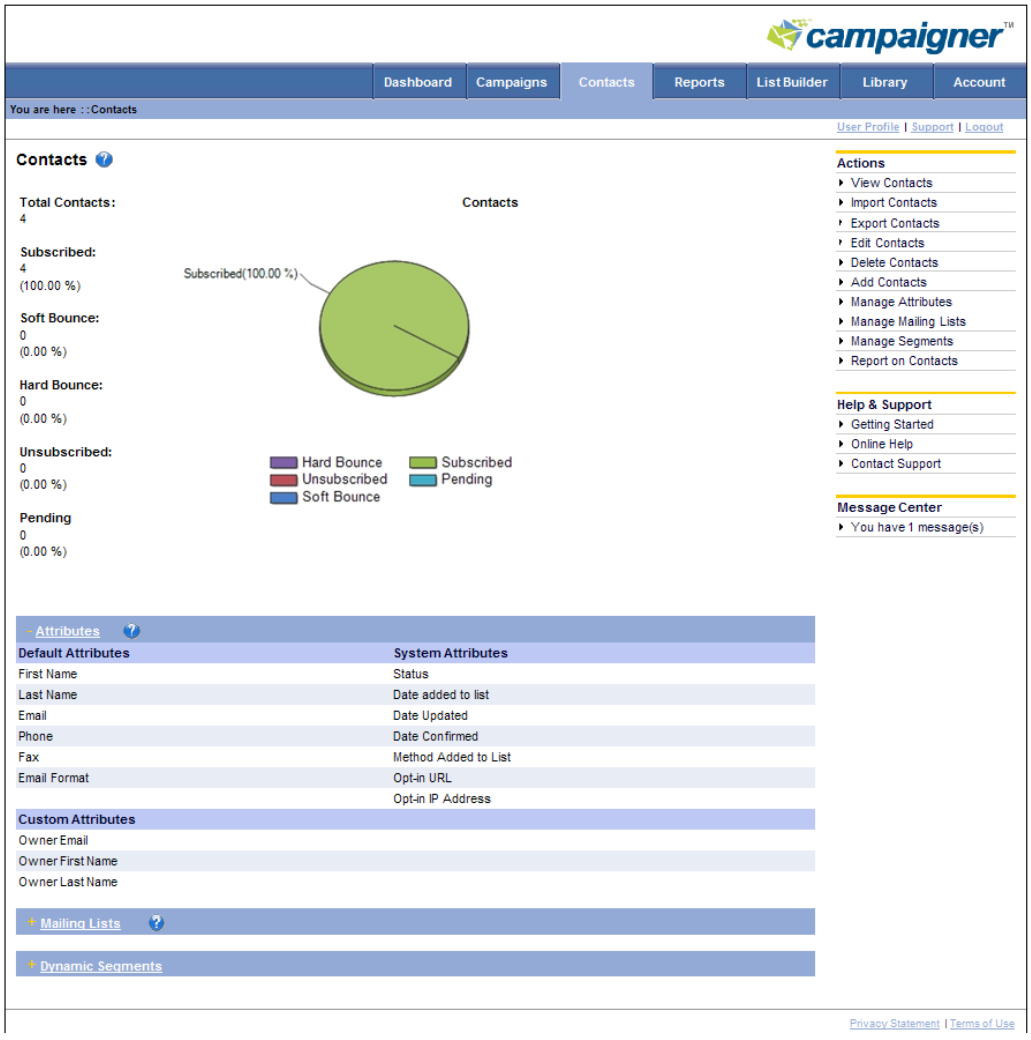



## Confirmation

1. Click **Next** to confirm and save the campaign. The success page is displayed.
2. Click **Continue** to exit the wizard and be redirected to a summary view of the campaign.

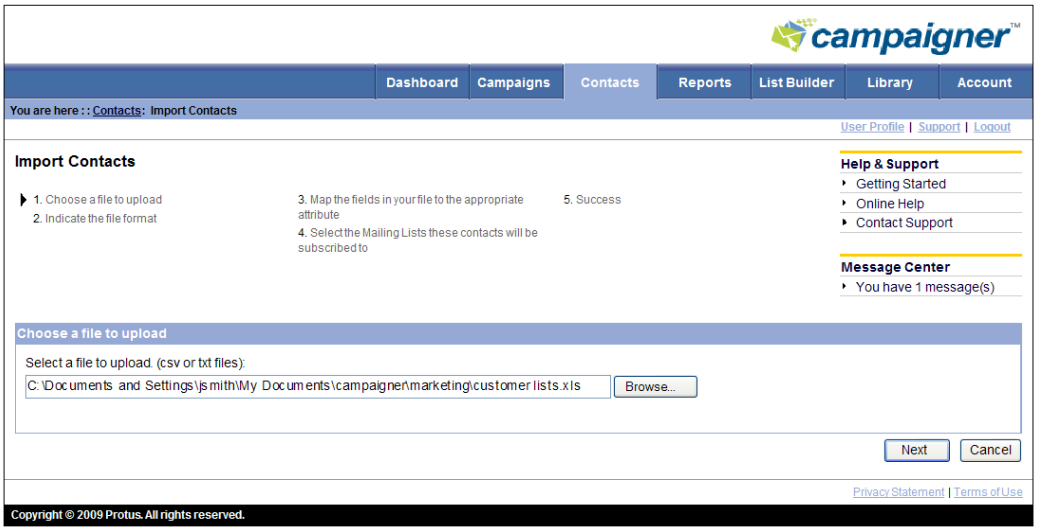
# Managing Contacts

The people who receive your email campaigns are in your Contacts, each having attributes such as a unique email address, first and last name, etc.
You can accumulate Contacts in one of three ways; you can import a list of contacts, manually add a contact, or have people provide their contact information by completing a double opt-in List Builder form.
Contacts can be grouped into mailing lists according to common attributes or expressed interests.
Contacts can also be segmented into groups according to common attributes or demographic.
The **Contacts** page provides a summary view of all your contacts and quick access to your contacts' attributes, and to your mailing lists and segments.

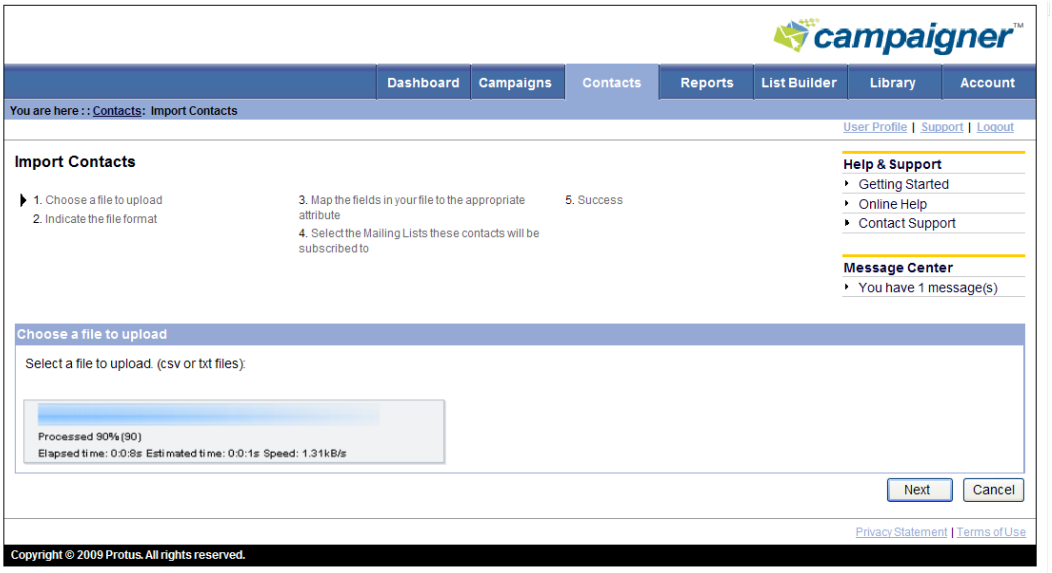


## Importing Contacts

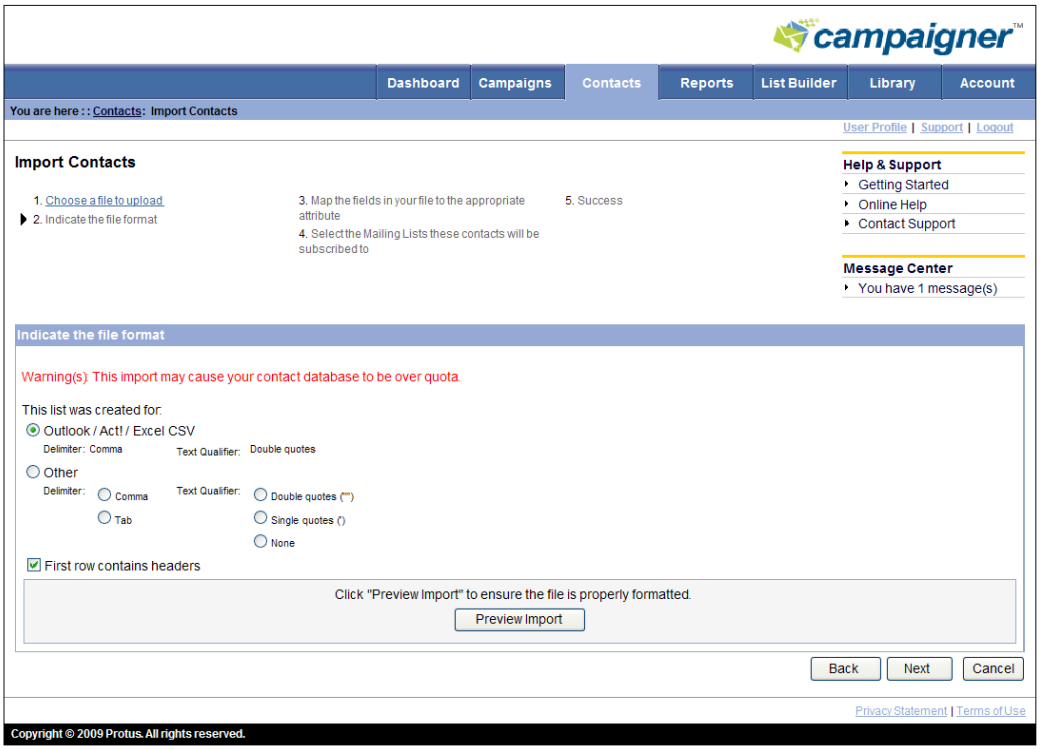
1. Click on the **Import Contacts** Action. The **Import Contacts** page is displayed.



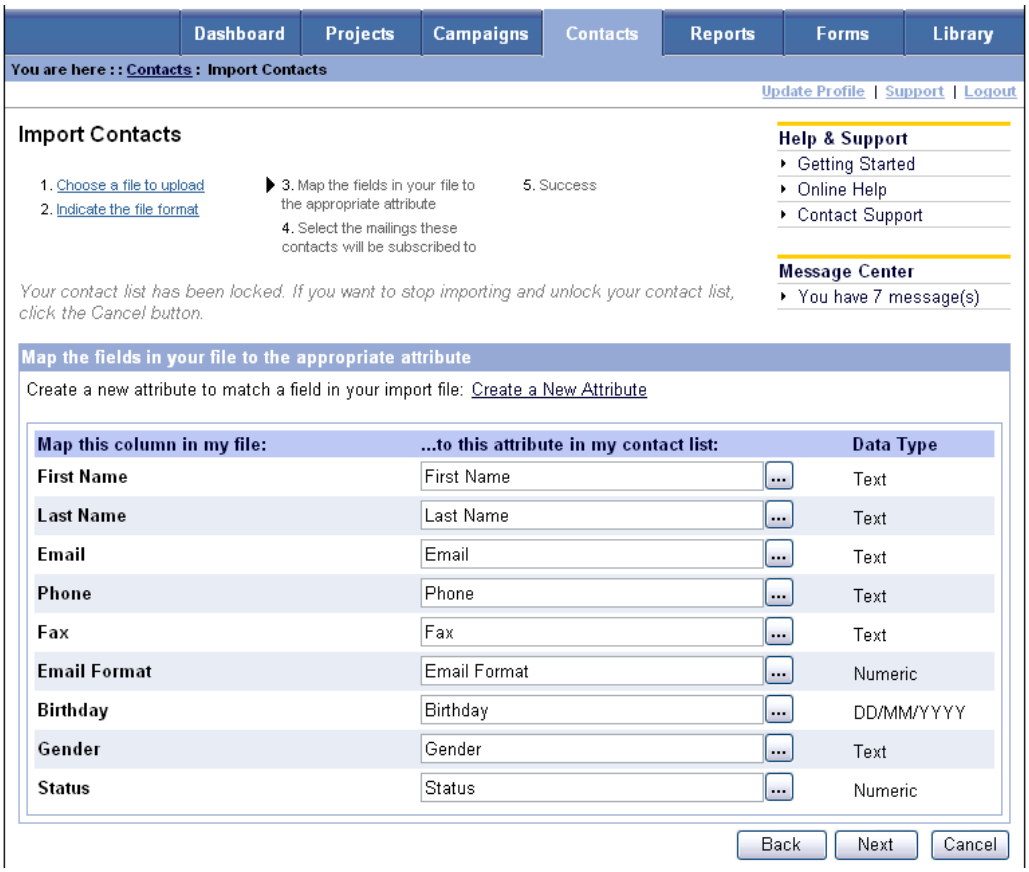

2. Select the file containing the data to be imported by clicking **Browse** to locate the file. Click the **Next** button.




**Note**: Campaigner supports import of contacts from either .CSV or .TXT file.

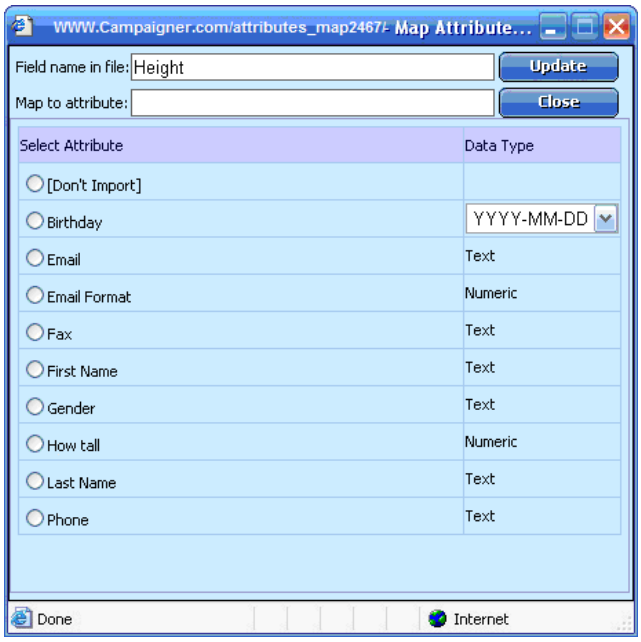



3. Select the format of the file you have chosen to upload. Select **First row contains headers** if your file contains a header row of field names.
4. Click the **Preview Import** button. You will be able to view the first five rows of the data being imported if your import settings are correct. Click the **Next** button.

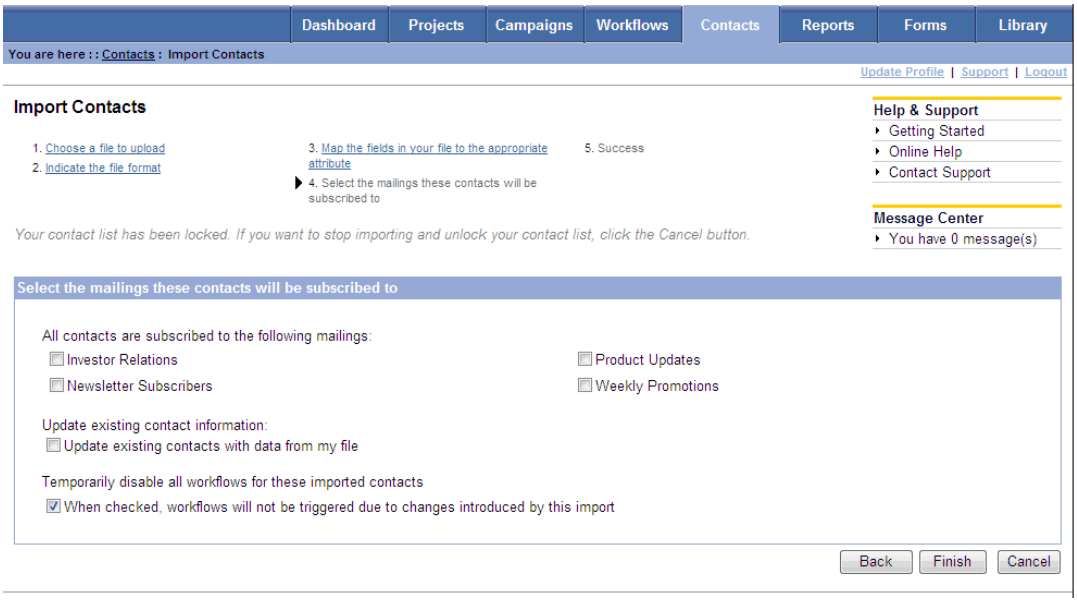



**Note**: **Create a New Attribute** if you cannot find an existing attribute to match a column from your import.

5. Map attributes of your import list to match the ones from your contact list. Click on ... to select a different attribute.



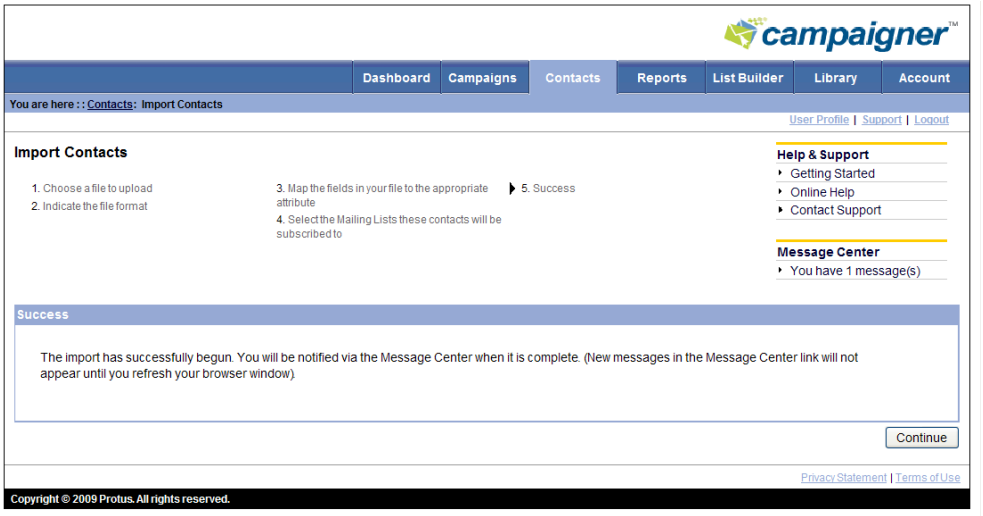
6. Select the attribute that corresponds to the column from your file. Click **Update** to map the attribute.
7. Click the **Next** button.


Dashboard
Projects
Campaigns
Workflows
Contacts
Reports
Forms
Library
You are here : : Contacts : Import Contacts
Update Profile | Support | Logout
Import Contacts
1. Choose a file to upload
2. Indicate the file format
3. Map the fields in your file to the appropriate attribute
4. Select the mailings these contacts will be subscribed to
5. Success
Help & Support
Getting Started
Online Help
Contact Support
Message Center
You have 0 message(s)
Your contact list has been locked. If you want to stop importing and unlock your contact list, click the Cancel button.
Select the mailings these contacts will be subscribed to
All contacts are subscribed to the following mailings:
Investor Relations
Newsletter Subscribers
Product Updates
Weekly Promotions
Update existing contact information:
Update existing contacts with data from my file
Temporarily disable all workflows for these imported contacts
When checked, workflows will not be triggered due to changes introduced by this import
Back
Finish
Cancel

8. Select the mailing lists to which you would like these uploaded contacts to be subscribed to.
9. Select **Update existing contacts with data from my file** if you wish to overwrite any existing contact information in your Contacts with the new uploaded information.
10. Select **Temporarily disable all workflows for these imported contacts** so that Attribute Value changes from the upload do not trigger a workflow.
11. Click **Finish** to start the import process, during which your Contacts list is locked. You will receive a confirmation that the import is in progress. Only after completion of the import will you be able to use your Contacts list.

### Contact List Locking

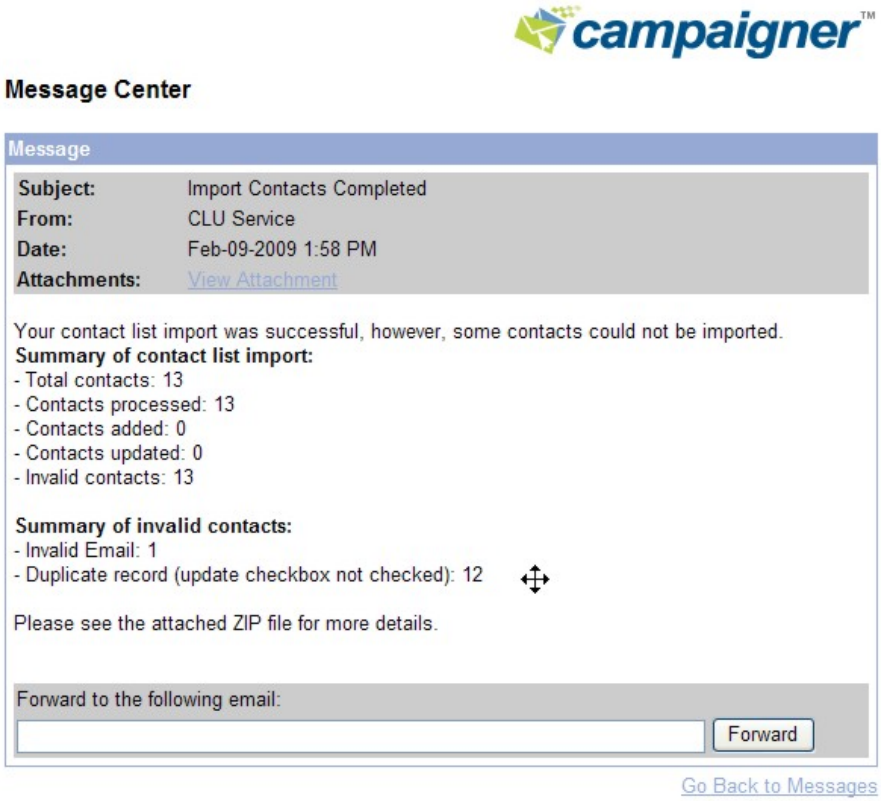
The Contacts list locking mechanism is in place to stop other transactions from being executed on your Contacts while your import is taking place. This will ensure that the import is executed correctly. Your contacts will be unlocked once the new contacts have been completely imported. You will be notified via the Message Center when the upload is complete.


campaigner
Dashboard
Campaigns
Contacts
Reports
List Builder
Library
Account
You are here : : Contacts: Import Contacts
User Profile | Support | Logout
Import Contacts
1. Choose a file to upload
2. Indicate the file format
3. Map the fields in your file to the appropriate attribute
4. Select the Mailing Lists these contacts will be subscribed to
5. Success
Help & Support
Getting Started
Online Help
Contact Support
Message Center
You have 1 message(s)
Success
The import has successfully begun. You will be notified via the Message Center when it is complete. (New messages in the Message Center link will not appear until you refresh your browser window).
Continue
Privacy Statement | Terms of Use
Copyright © 2009 Protus. All rights reserved.

**Note**: If the number of records in your file is greater than one million, it will be put in a queue and run after 12:00 AM the next day.

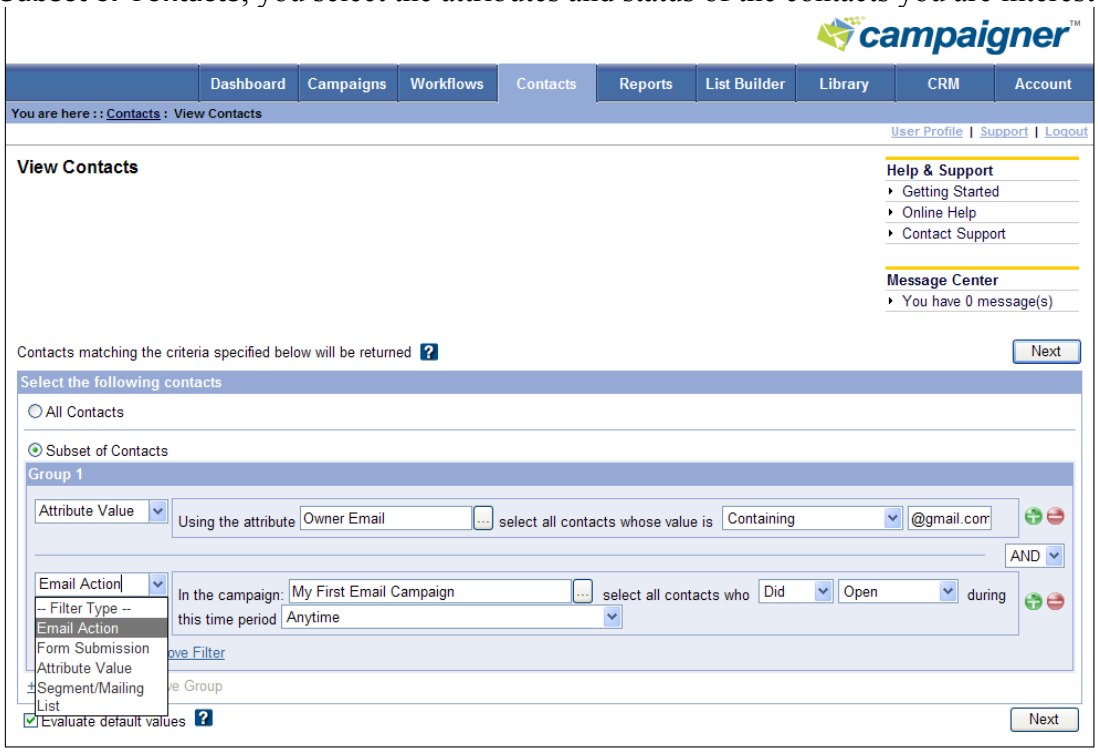
12. Click **Continue** to be redirected to the **Contacts** page. The contacts page can be refreshed to display the current status of the import.

A **Contact Import Report** message will be available in your **Message Center** once the import has completed. This message will contain two files; the list of contacts attempted to import, the list of contacts that couldn't be imported with reason. Click the **View Attachments** link in the message to extract and view the two files.


campaigner
Message Center
Message
Subject: Import Contacts Completed
From: CLU Service
Date: Feb-09-2009 1:58 PM
Attachments: View Attachment
Your contact list import was successful, however, some contacts could not be imported.
Summary of contact list import:
- Total contacts: 13
- Contacts processed: 13
- Contacts added: 0
- Contacts updated: 0
- Invalid contacts: 13
Summary of invalid contacts:
- Invalid Email: 1
- Duplicate record (update checkbox not checked): 12
Please see the attached ZIP file for more details.
Forward to the following email:
Forward
Go Back to Messages

## Viewing and Editing Contacts

1. Select the **Contacts** tab.
2. Click the **View Contacts** Action.
3. Choose whether to display **All Contacts** or a **Subset of Contacts** grouped by search criteria. For a **Subset of Contacts**, you select the attributes and status of the contacts you are interested in.



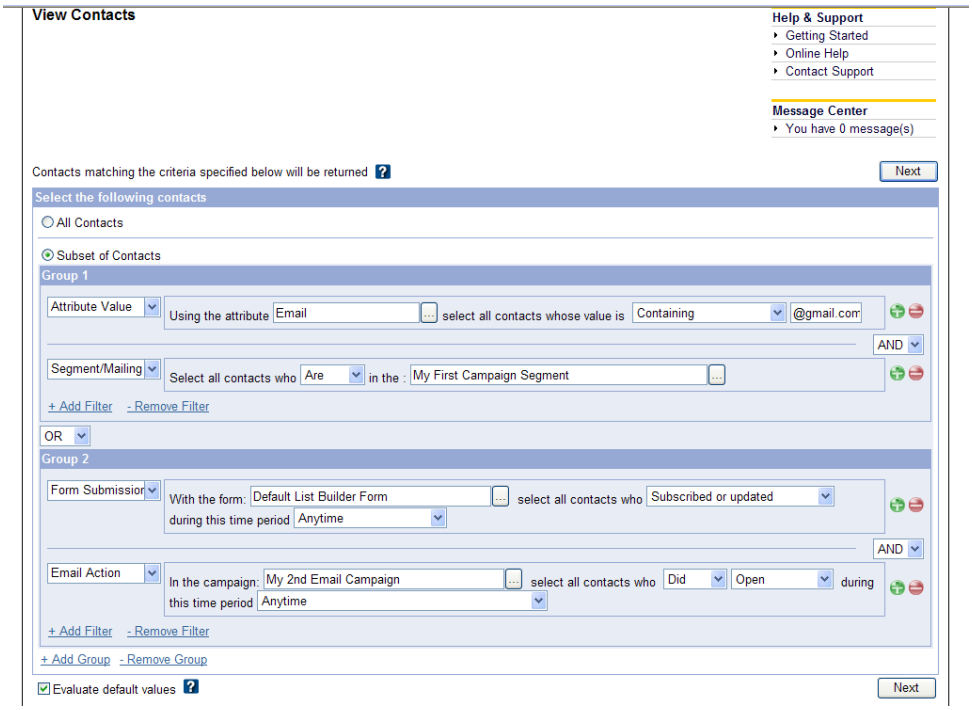

**Subset of Contacts** searches lets you specify a variety of search parameters to help specify which contacts should be returned.

## Subset of Contacts Search Criteria

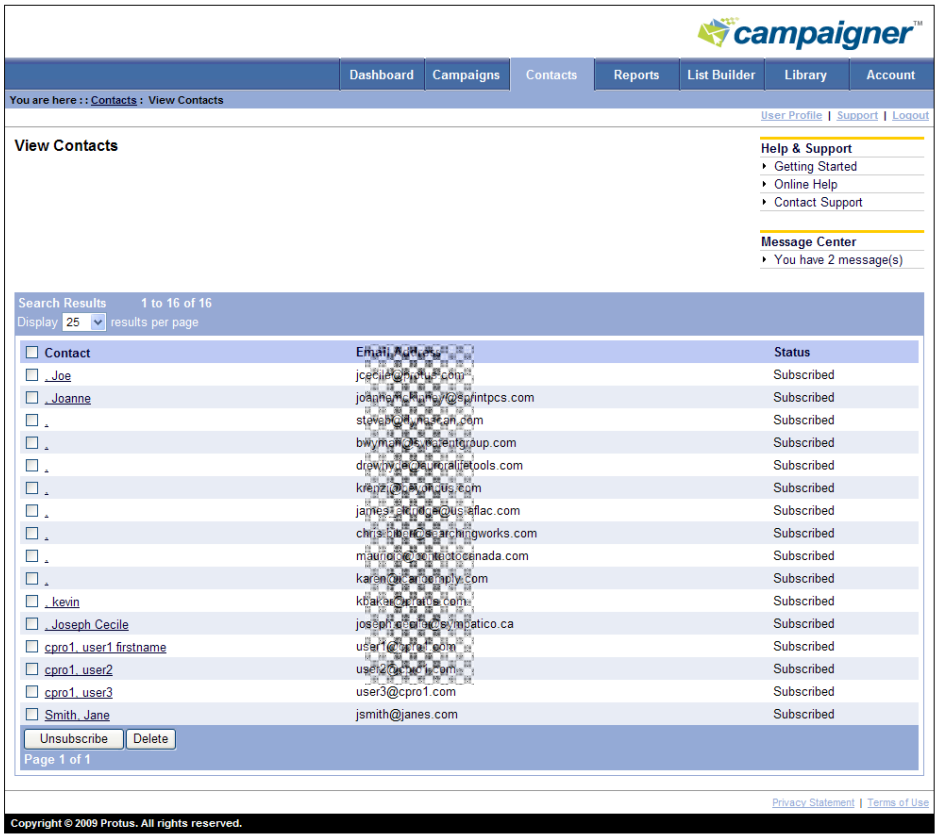
**Subset of Contacts** searches are defined by **Filter Types** and **Group** search criteria. Contacts that satisfy the conditions specified in the Filter Types in a Group will be included. Multiple **Filter Types** and **Groups** can be combined using the AND or OR operator, as specified by the drop down list between Filter Types and the Groups.
Each Group search criteria can be set to one of the following four **Filter Types**:

- Email Action – Open, Forward, Reply, etc.
- Form Submission – Which List Builder Form, Subscribe, Updated, etc.
- Attribute Value – e.g. Email address attribute contains "@gmail.com"
- Segment/Mailing List – Contacts who Are or Are Not in a specified Mailing List

Multiple Groups can be used to form advanced searches. They are evaluated in an ascending order.

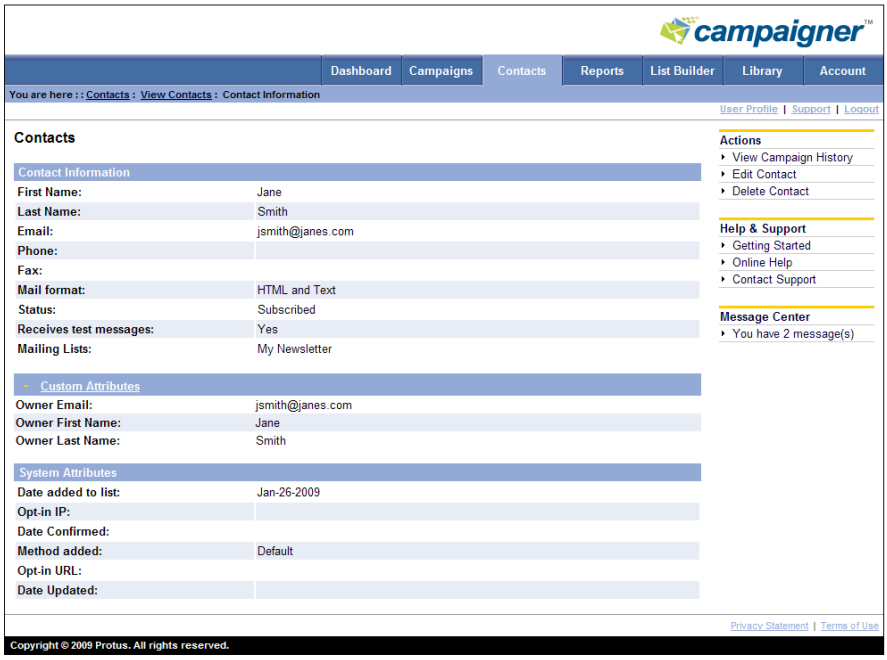



4. **Click Next** to continue. The Contacts **Search Results** is provided.

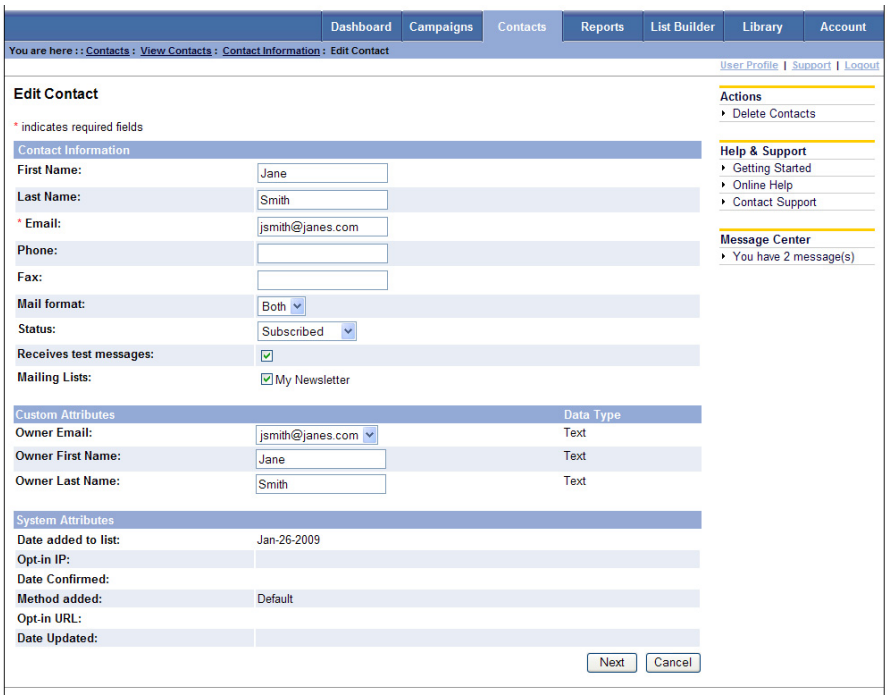



5. Click on a contact to see all of its attributes.

## Editing Contacts



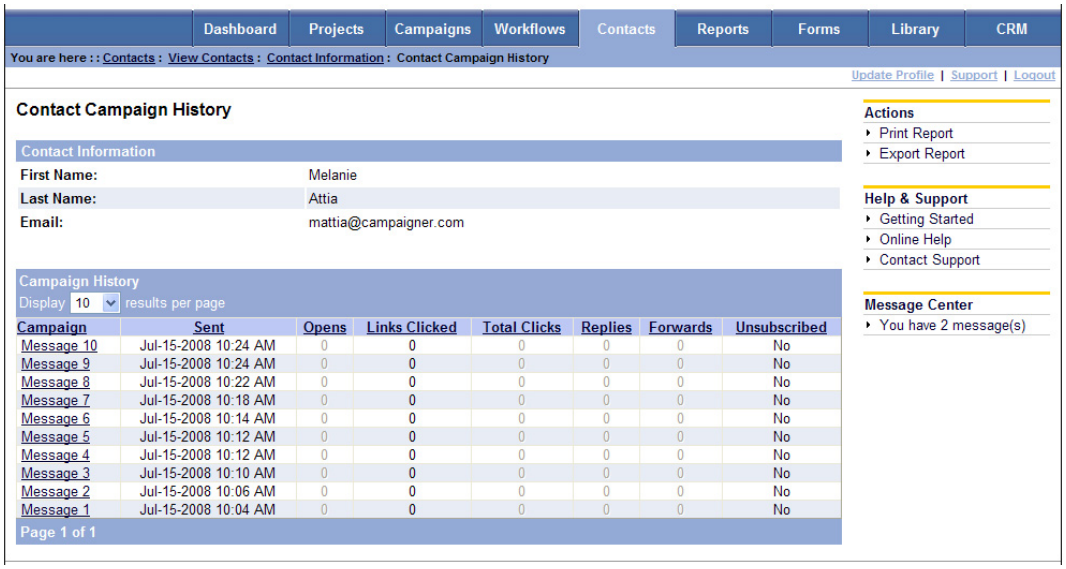

1. Click on the **Edit Contact** Action. The **Edit Contact** page is displayed.




2. Make any desired changes and click **Next**. You are redirected to a confirmation page.
3. Click **Yes** to continue with the updates and to return to the **Contact Information** page.

## Contact History

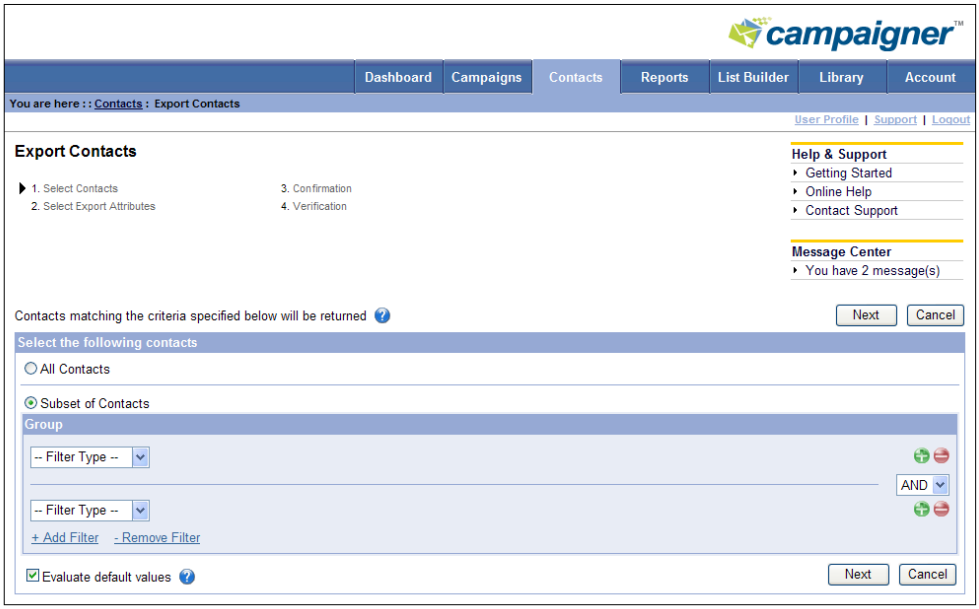
1. Click on the **View Campaign History** Action. It will take you to the **Contact Campaign History** page, where you will find all the campaigns sent to this contact and their actions taken.


Dashboard
Projects
Campaigns
Workflows
Contacts
Reports
Forms
Library
CRM
You are here : : Contacts : View Contacts : Contact Information : Contact Campaign History
Update Profile | Support | Logout
Contact Campaign History
Actions
Print Report
Export Report
Help & Support
Getting Started
Online Help
Contact Support
Message Center
You have 2 message(s)
Contact Information
First Name: Melanie
Last Name: Attia
Email: mattia@campaigner.com
Campaign History
Display 10 results per page
Campaign | Sent | Opens | Links Clicked | Total Clicks | Replies | Forwards | Unsubscribed
Message 10 | Jul-15-2008 10:24 AM | 0 | 0 | 0 | 0 | 0 | No
Message 9 | Jul-15-2008 10:24 AM | 0 | 0 | 0 | 0 | 0 | No
Message 8 | Jul-15-2008 10:22 AM | 0 | 0 | 0 | 0 | 0 | No
Message 7 | Jul-15-2008 10:18 AM | 0 | 0 | 0 | 0 | 0 | No
Message 6 | Jul-15-2008 10:14 AM | 0 | 0 | 0 | 0 | 0 | No
Message 5 | Jul-15-2008 10:12 AM | 0 | 0 | 0 | 0 | 0 | No
Message 4 | Jul-15-2008 10:12 AM | 0 | 0 | 0 | 0 | 0 | No
Message 3 | Jul-15-2008 10:10 AM | 0 | 0 | 0 | 0 | 0 | No
Message 2 | Jul-15-2008 10:06 AM | 0 | 0 | 0 | 0 | 0 | No
Message 1 | Jul-15-2008 10:04 AM | 0 | 0 | 0 | 0 | 0 | No
Page 1 of 1

2. Click on **Print Report** to print the report
3. Click on **Export Report** to export the report.

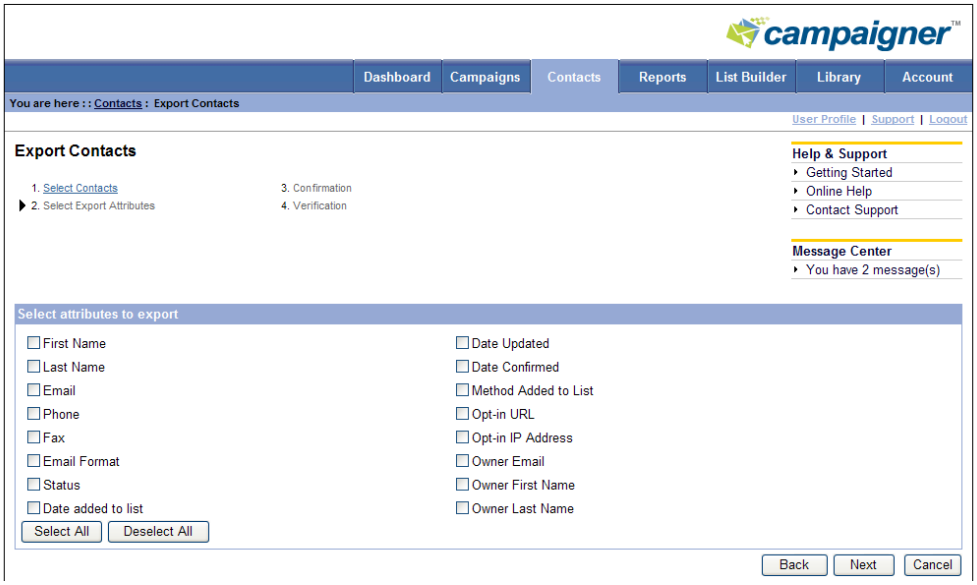
## Exporting Contacts

1. Click on the **Export Contacts** Action. The **Export Contacts** page is displayed.




2. Select either **All Contacts** or **Subset of Contacts** with the appropriate search criteria and click **Next**.

3. Select the attributes you would like to export with each contact and click **Next**. A confirmation page with a summary of the export is shown.

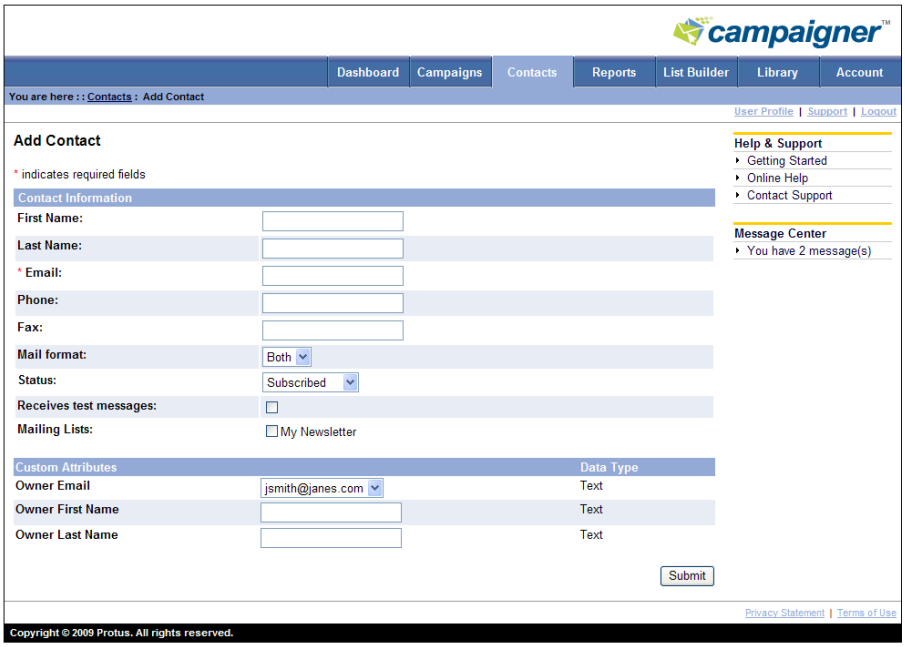



4. Click **Finish** to begin the export. The success page is displayed.
5. Click **Continue** to be returned to the **Contacts** page.

Your exported contact list will be available in your **Message Center**, as .CSV attachment to the message 'Export Contacts Successful'. You can forward the message with attachment to any email address.

## Adding a Contact

1. From the **Contacts** tab, click on the **Add Contacts** Action. The **Add Contacts** page is displayed.



2. Enter the contact's information and any custom attribute.

The Mail format specifies whether the new contact can receive emails in plain text format, HTML format, or either one. Status should be set to Subscribed. Contacts with the attribute **Receives test messages:** selected will receive test messages that are sent out when you test your campaigns.

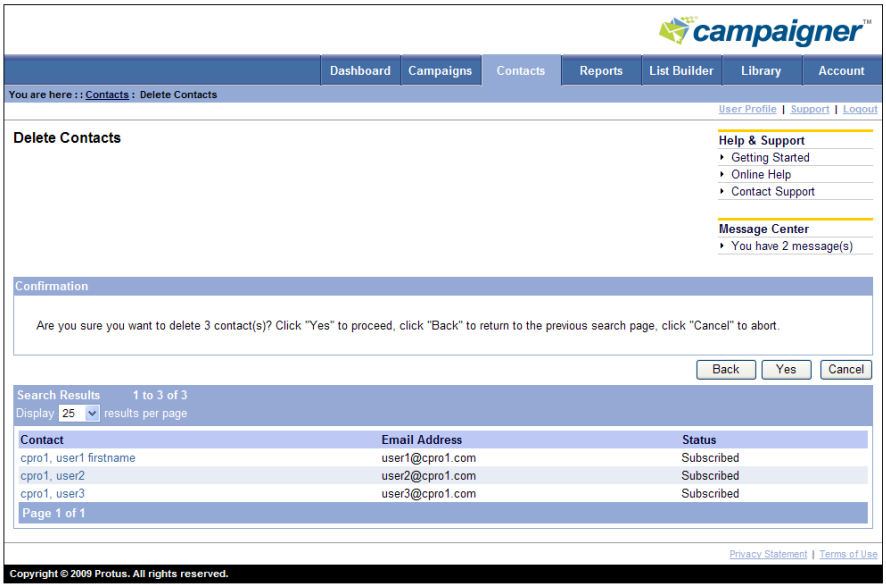
3. Click **Submit**. You are redirected to a confirmation page.
4. Click **Yes**. The **Contacts** page is displayed.

## Deleting a Contact

1. From the **Contacts** tab, click on **View Contacts**. The **View Contacts** page is shown.
2. Select either **All Contacts** or **Subset of Contacts** with the appropriate search criteria and click **Next**.
3. Select the check box beside the contact you wish to remove from the list and click the **Delete** button.

Or,

1. From the **Contacts** tab, click on **Delete Contacts**. The **Delete Contacts** page is shown.
2. Select either **All Contacts** or **Subset of Contacts** with the appropriate search criteria and click **Next**.

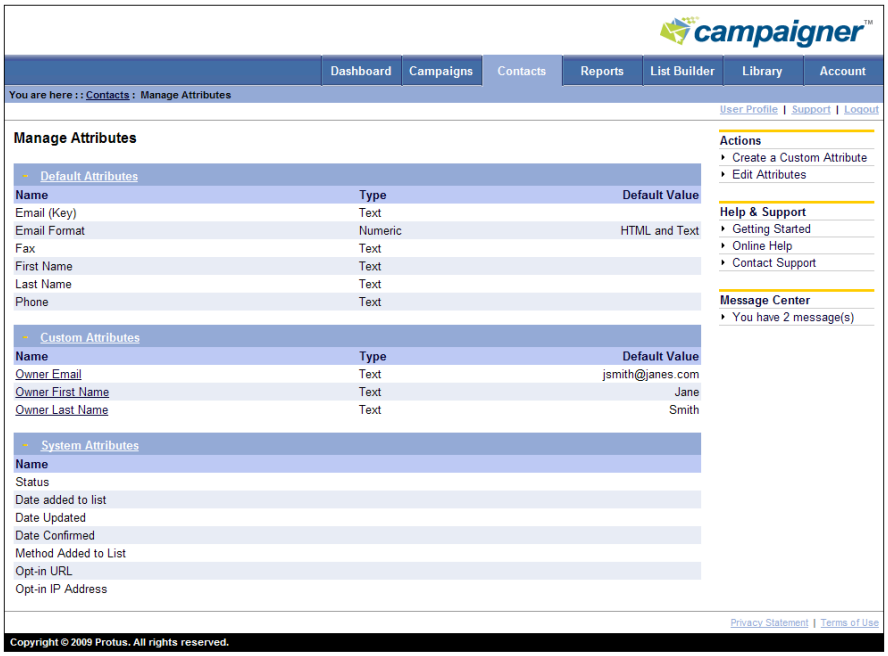



**Note:** Contact are not removed from the system. If you delete a contact whose status is 'unsubscribed' and then add that contact back into your list, the contact's status will still be 'unsubscribed'. A contact's status can only be changed back to "subscribed" by completing the double opt-in process.

## Managing Contact Attributes

A contact attribute refers to a specific piece of information about a contact. For instance, the attribute Last Name contains the last name of a contact.

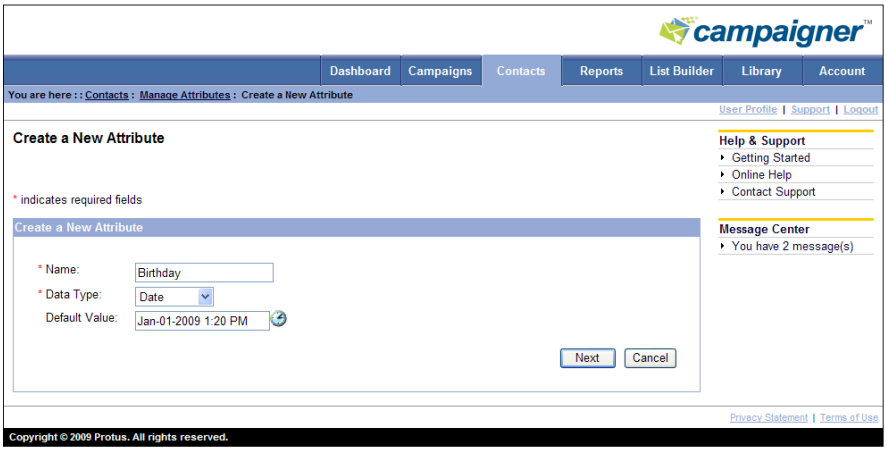
1. From the **Contacts** tab, click on the **Manage Attributes** Action.




There are three main types of attributes: **default**, **custom**, and **system**. **Default** attributes are common for all contacts. **Custom** attributes can be created to record any unique contact information that you would like to collect. **System** attributes are automatically created and cannot be edited.

## Creating a Custom Attribute

1. From the **Manage Attributes** page, click on the **Create a Custom Attribute** Action. The **Create a New Attribute** page is displayed.




2. Enter the **Name** of your custom attribute.
3. Select the **Data Type** of your attribute. It can be Date, Numeric, Text or True/False.
4. Enter the **Default Value** of your custom attribute. This will be used when a new contact's imported data does not include a value. It can be left blank but is useful when personalizing an email. For example, the default value "Customer" can be used in the first name field so that the

greeting of an email campaign becomes “Dear Customer” when the first name is not available for the personalization wildcard, e.g. “Dear [Contact.Firstname]”.

5. Click **Add** to continue. A confirmation page is displayed.
6. Click **Yes** to confirm new attribute creation and proceed to the success page.

## Editing Attributes

1. From the **Manage Attributes** page, click on the **Edit Attributes** Action. The **Edit Attributes** page is displayed.

**Note**: The data type of a custom attribute cannot be edited. The attribute must be deleted and a new attribute created in order to update the data type.

**Note**: Deleting an attribute will delete this data for all of your contacts. Be sure to export your contact list before deleting an attribute in order to preserve that data.

2. Edit the default and custom attributes.
3. Click **Save**. You are redirected to a confirmation page.
4. Click **Yes** to confirm edits. The success page is displayed.
5. Click **Continue** to go to the **Manage Attributes** page.

## Delete a Custom Attribute

1. From the **Edit Attributes** page, select the checkbox next to the custom attribute(s).
2. Click **Delete Custom Attribute(s)**. A confirmation dialog box is displayed.
3. Click **OK** to perform the deletion. You are redirected to the **Edit Attributes** page.

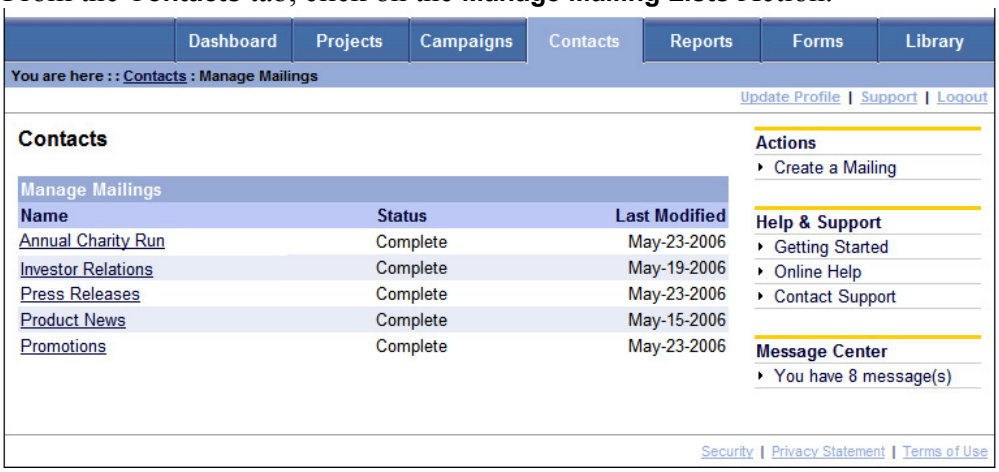
### Unique Key Identifier

The unique key identifier is used to differentiate one contact from another. By default, it is the email address of the contact. Therefore, no two contacts can possess the same email address.

## Managing Mailing Lists

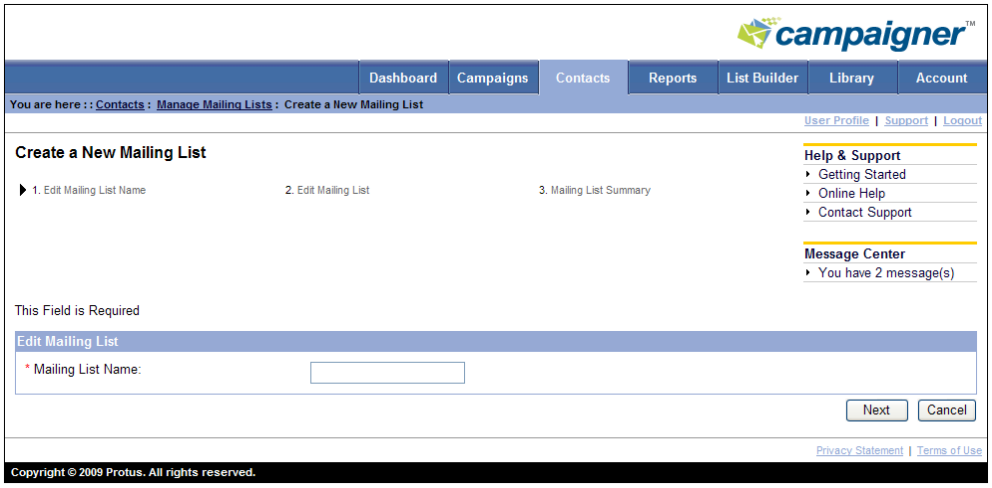
Mailings Lists are lists to which groups of contacts have opted-in to receive a specific type of email communication. These contacts have consented to receive related emails on an ongoing basis. Contacts have the option to opt-out of future emails. The **Contacts** page allows you to manage existing mailing lists and create new ones.

1. From the **Contacts** tab, click on the **Manage Mailing Lists** Action.




## Creating a Mailing List

1. From the **Manage Mailing Lists** page, click on the **Create a New Mailing List** Action. The **Create a New Mailing List** page is displayed.

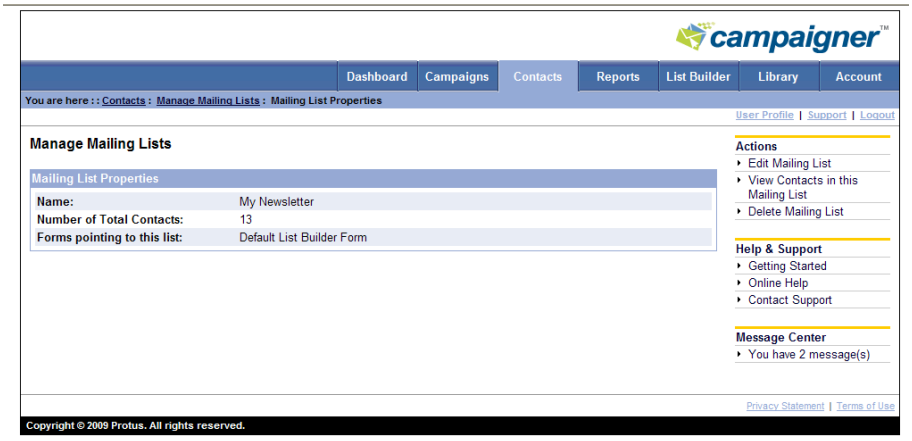



2. Enter the name of the new mailing list and click **Next** to continue. The search form is displayed.
3. Choose whether to include **All Contacts** or a **Subset of Contacts** with search criteria in the mailing list.

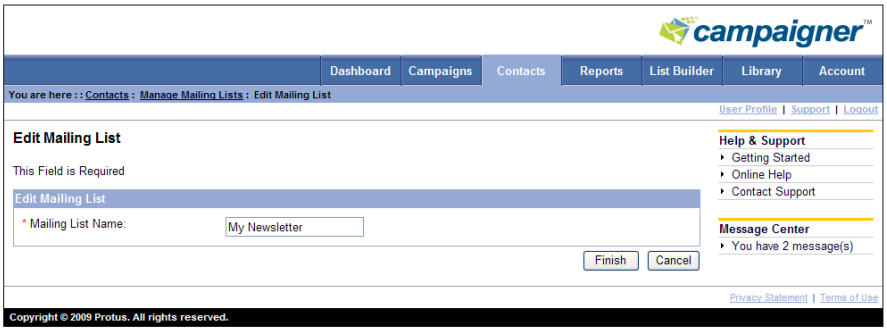
4. Click **Next** to continue. The **Mailing List Summary** page is displayed. It shows the number of contacts in your mailing list and any restrictions based on the search criteria that relate to these contacts.
5. Click **Finish** to complete creation of the new mailing list. You are redirected to the **Manage Mailing Lists** page.

## Edit Mailing Lists

1. From the **Manage Mailing Lists** page, click on name of the mailing you would like to view. A **Mailing List Properties** table is displayed.




2. Click on the **Edit Mailing List** Action.




5. Edit the name of your mailing in the **Mailing List Name** textbox.
6. Click **Save** to change the name of Mailing List. You are directed to the **Manage Mailing Lists** page.

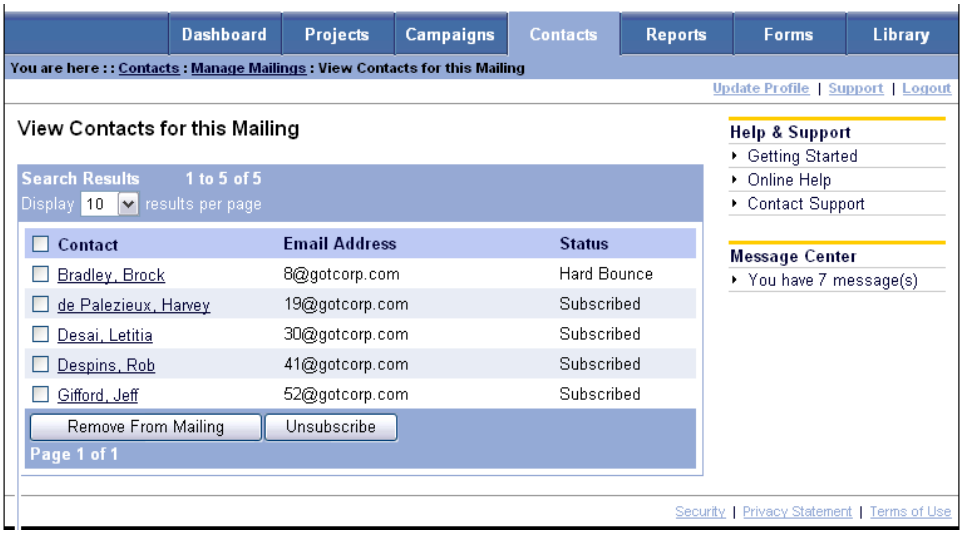
## Delete a Mailing List

1. From the **Manage Mailing Lists** page, click on the name of the mailing you would like to delete. The mailing list's properties are displayed.
3. Click on the **Delete Mailing List** Action. A confirmation page is displayed.
4. Click **Yes** to confirm deletion. A success page is displayed.

5. Click **Continue** to complete the deletion process. You are redirected to **Manage Mailing Lists** page.

## View Mailing List contacts

1. From the **Manage Mailing Lists** page, click on the name of the mailing list you would like to view. The mailing list's properties are displayed.
2. Click on the **View Mailing List Contacts** Action. The contacts for this mailing list are listed alphabetically by name. Click on the contact's name to be redirected to the **Contact Information** page.




## Remove contacts from a mailing list or unsubscribe contacts

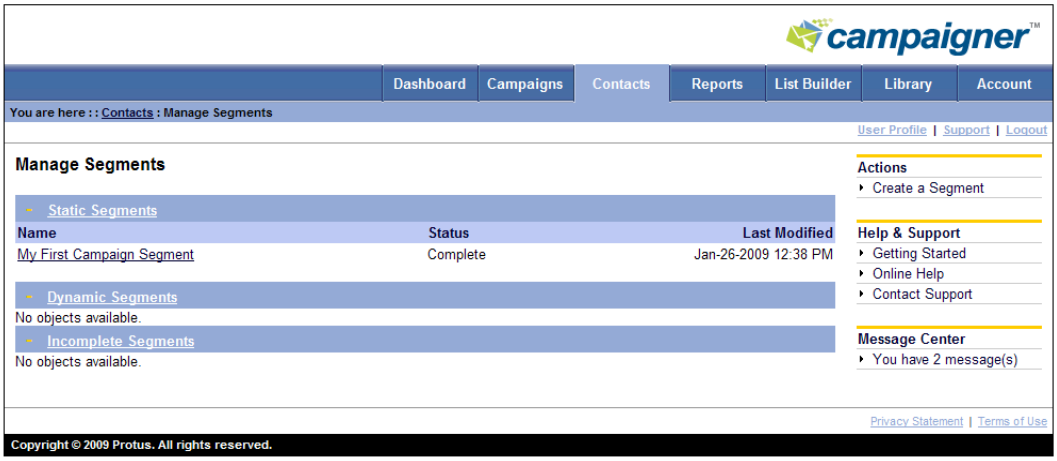
1. From the **Manage Mailing Lists** page, click on the name of the mailing list you would like to view. The mailing list's properties are displayed.
2. Click on the **View Contacts in this Mailing List** Action.
3. Select the checkboxes next to the contact(s) you would like to remove from the mailing list or to set to unsubscribe.
4. Click on **Remove from Mailing List** or **Unsubscribe**. A dialog box will popup to confirm your selection.
5. Click **OK** to continue.

**Note**: Selecting the **Unsubscribe** option will change the status of the contact to "**unsubscribed**" in all mailing lists. The contact will remain in the **Contacts** database but will not receive any email.

## Managing Segments

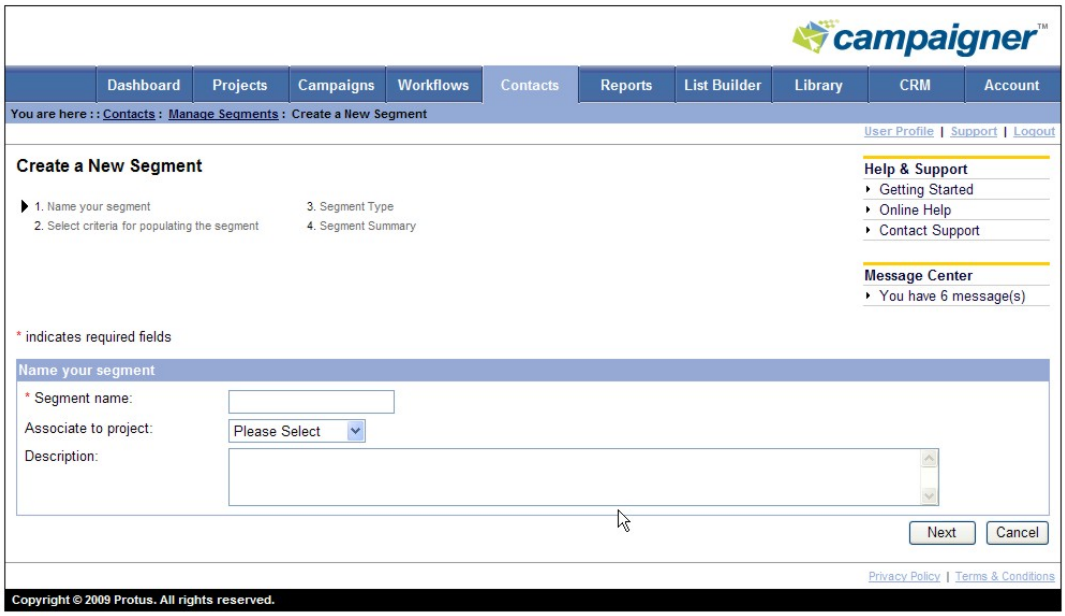
The Contacts segmentation function allows you to group contacts for email campaigns based on common attributes, demographics or past actions.

1. From the **Contacts** tab, click the **Manage Segments** Action. The **Manage Segments** page is displayed.




## Creating Segments

1. From the **Manage Segments** page, click on the **Create a Segment** Action. The **Create a New Segment** page is displayed.




2. Enter the new segment's name in the field **Segment Name**.
3. Click **Next** to continue.
4. Choose whether to search **All Contacts** or a **Subset of Contacts** with search criteria and click **Next**.
5. Select the type of segment you would like to create.

**Dynamic Segments**

A **Dynamic** segment determines the list of contacts that meet the segmentation criteria at the instant the campaign is sent.

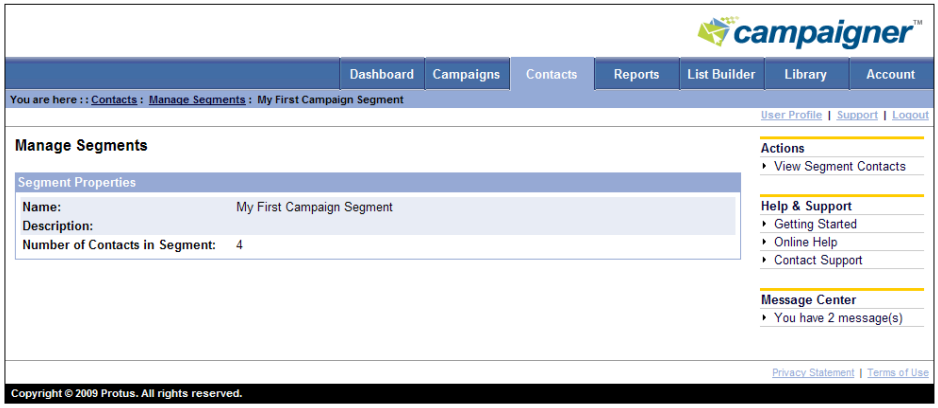
**Static Segments**

A **Static** segment is used to create campaign test groups. **Static** segments have the option of selecting a random percentage or number of the contacts that meet the segment criteria. This group of contacts is then "frozen in time", unlike Dynamic Segments which can change over time. It allows you to track a group's responses to a campaign compared to those of other groups.

6. Click **Next** to create the segment. The **Segment Summary** box is displayed.
7. Click **Finish** to return to the **Manage Segments** page.

## Managing Existing Segments

1. From the **Manage Segments** page, click on the name of the segment. The segment's properties are displayed.

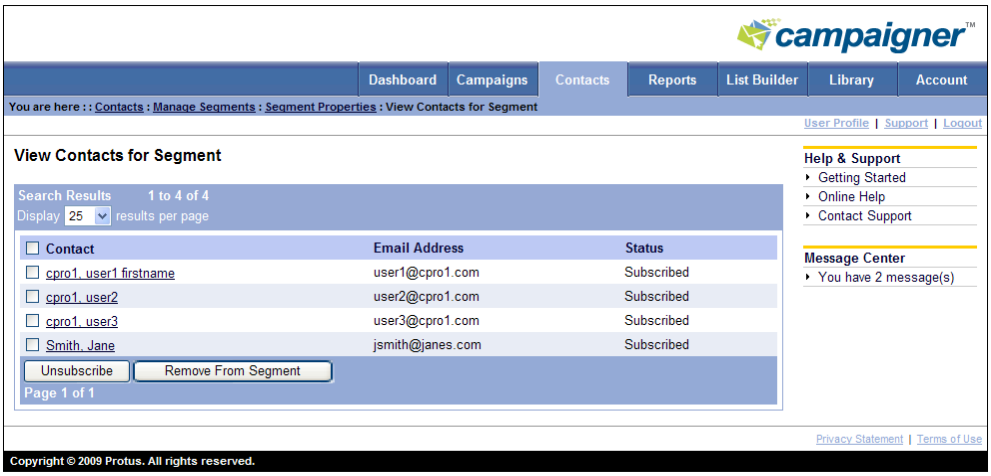



2. Click on the **View Segment Contacts** Action. The contacts are displayed.

## Remove or unsubscribe contacts from segments

3. Select the checkboxes next to the contact you would like to remove or unsubscribe.
4. Click **Remove from Segment** or **Unsubscribe**. A dialog box will popup to confirm your selection.

**Note**: Selecting the Unsubscribe option will change the status of the contact to "**unsubscribed**" in all segments and mailing lists. The contact will remain in the Contacts but will not receive any emails.




5. Click **OK** to continue.

## Edit Segments

1. From the **Manage Segments** page, click on the dynamic segment you would like to edit. The segment's properties are displayed.
2. Click on the **Edit Segment** Action. You are redirected to the **Edit Segments** page.
3. Edit the name of the segment in the **Segment Name** field.
4. Click **Next** to continue. The search form is displayed. You can change the search criteria that are used to create the dynamic segment.
5. Click **Next**. You are redirected to the **Segment Summary** page.
6. Click **Finish** to return to the **Segment Properties** page.

**Note**: Contacts cannot be eliminated from a dynamic segment because dynamic segments are updated at the time the campaign is sent.

**Note**: Only dynamic segments can be edited. Static segments, once created, are not editable and contacts in the segment remain unchanged.

## Copy a Segment

1. From the **Manage Segments** page, click on the dynamic segment you would like to copy. The **Manage Segments** page is displayed.
2. Click on the **Copy Segment** Action.
3. Rename the segment in the **Segment Name** field.
4. Click **Finish** to continue with copying of the dynamic segment. A confirmation page is displayed.
5. Click **Yes** to confirm copying. A success page is displayed.
6. Click **Continue** be return to the **Manage Segments** page.

**Note**: You are not able to copy a Static Segment.

## Delete a segment

1. From the **Manage Segments** page, click on the name of the **Segment** you would like to delete. A **Segments Properties** table is displayed.

2. Click on the **Delete Segment** Action. A confirmation page is displayed.
3. Click **Yes** to confirm deletion. A success page is displayed.
4. Click **Continue** to be redirected to the **Manage Segments** page.

**Note**: Segments cannot be deleted if they are referenced by a campaign that has not yet been sent, is incomplete, or has been saved.

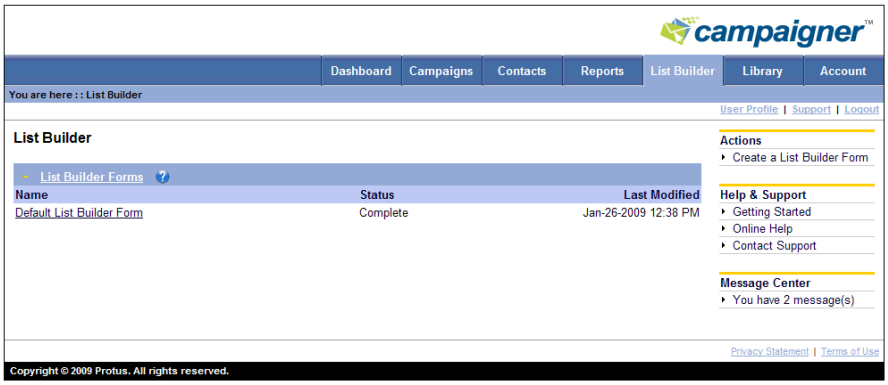
# List Builder Forms

A List Builder subscription form is used to acquire contacts and grow your mailing lists. It uses the permission-based double opt-in process, in which a List Builder form submitted by a new subscriber causes a confirmation email to be sent to the new subscriber. The confirmation email contains a confirmation link that when clicked confirms the subscription request, validates their email address and adds them as a contact to a mailing list. This also changes their contact status from '**Pending'** to '**Subscribed'** in the Contacts database. This helps ensure that contact information is valid and helps avoid spam complaints.

These web based forms are accessed by prospective subscribers via a web link on your web site or in an email. A 'Thank You' page and confirmation email are automatically generated when a List builder form is submitted. A 'Welcome' page and optional 'Welcome' email are automatically generated when a new contact confirms their subscription.

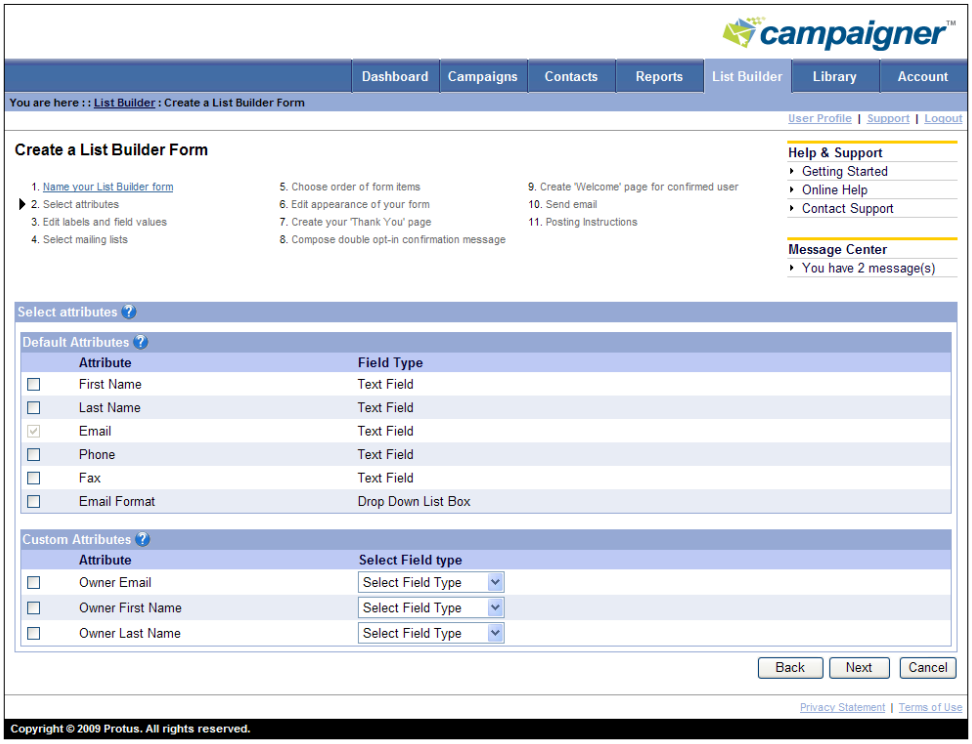
## Creating List Builder Forms

1. Click on the **List Builder** tab.




2. Click on the **Create a List Builder Form** Action. The **Create a List Builder Form** page is displayed.

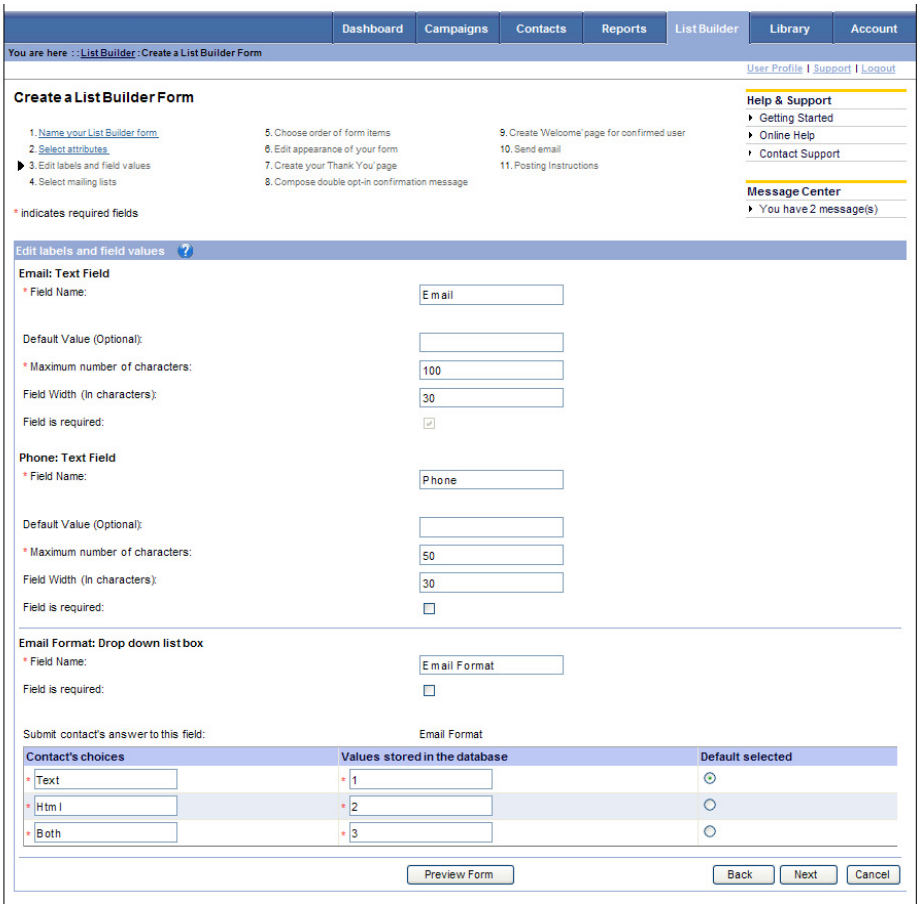
3. Enter a name in the **Page Name** field.
4. Click **Next** to continue. The **Select Attributes** page is displayed. All of the attributes that can be used as fields in your form are listed on this page.



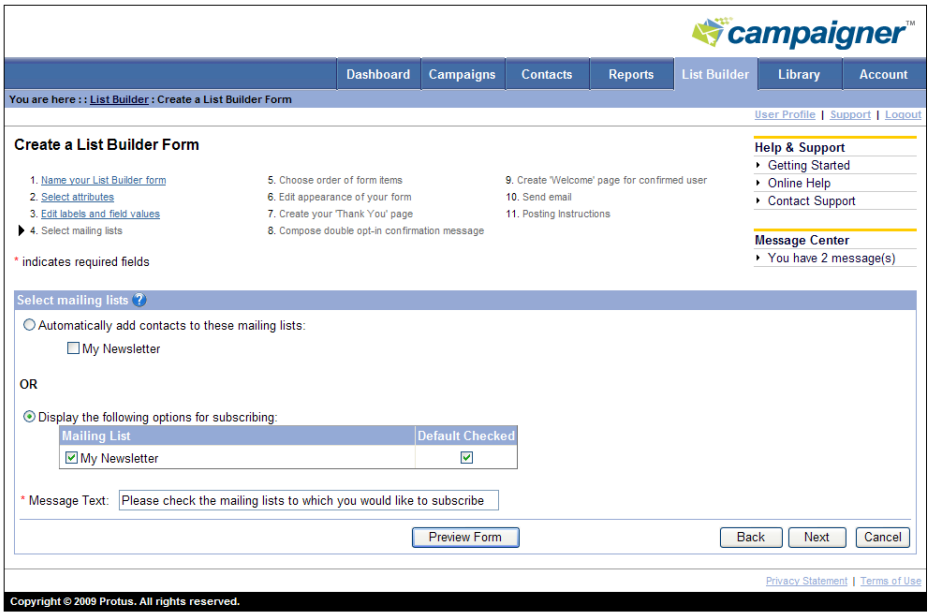

5. Select the default and custom attributes you would like included in the form. Each custom attribute requires you to assign a field type to ensure that the data captured is in the proper format.

   Field Types include:

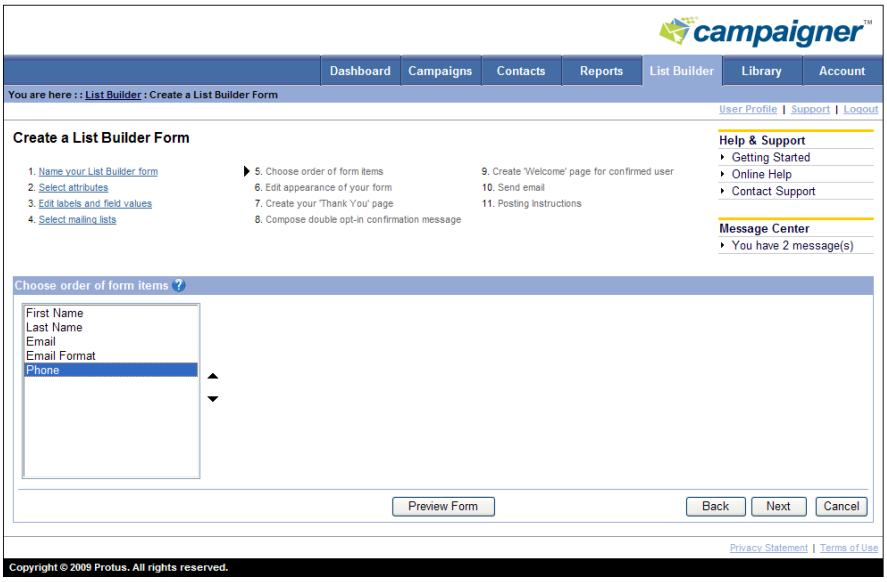
   1. Drop down list box – provides predefined choices
   2. Checkbox – Yes/No selection
   3. Text field (one line of text) – free form input
   4. Text area (multiple lines of text) – free form input
   5. Radio buttons – provides predefined choices
   6. Date field – free form day, month and year selection
   7. Calendar field – popup calendar for day, month and year selection



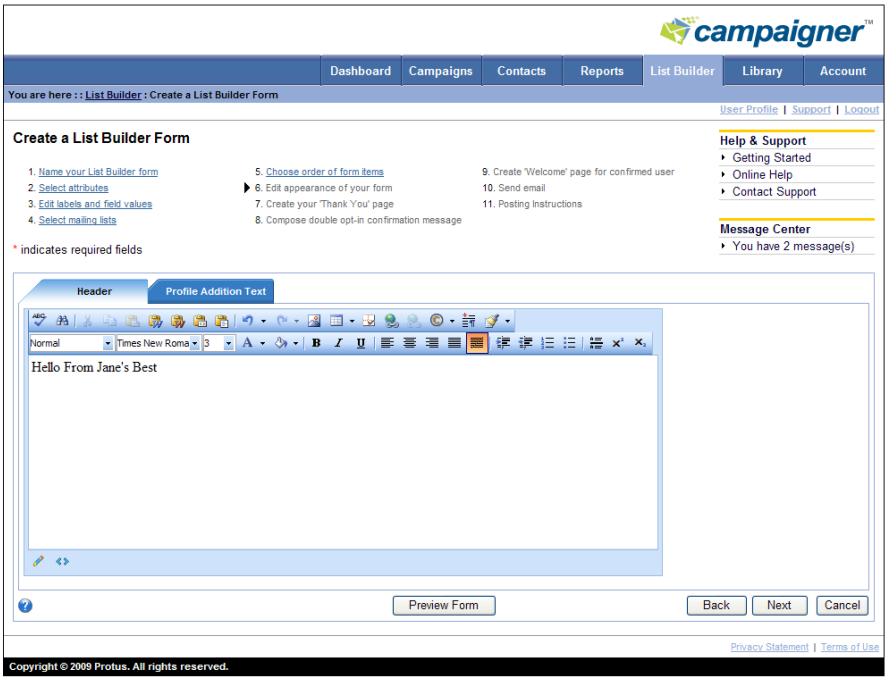

6. Click **Next**. Edit the appearance of each field that will appear on the form. Preview the appearance of the questions in your form by clicking **Preview Form**.
7. Click **Next**. The **Select mailing lists** page is displayed.



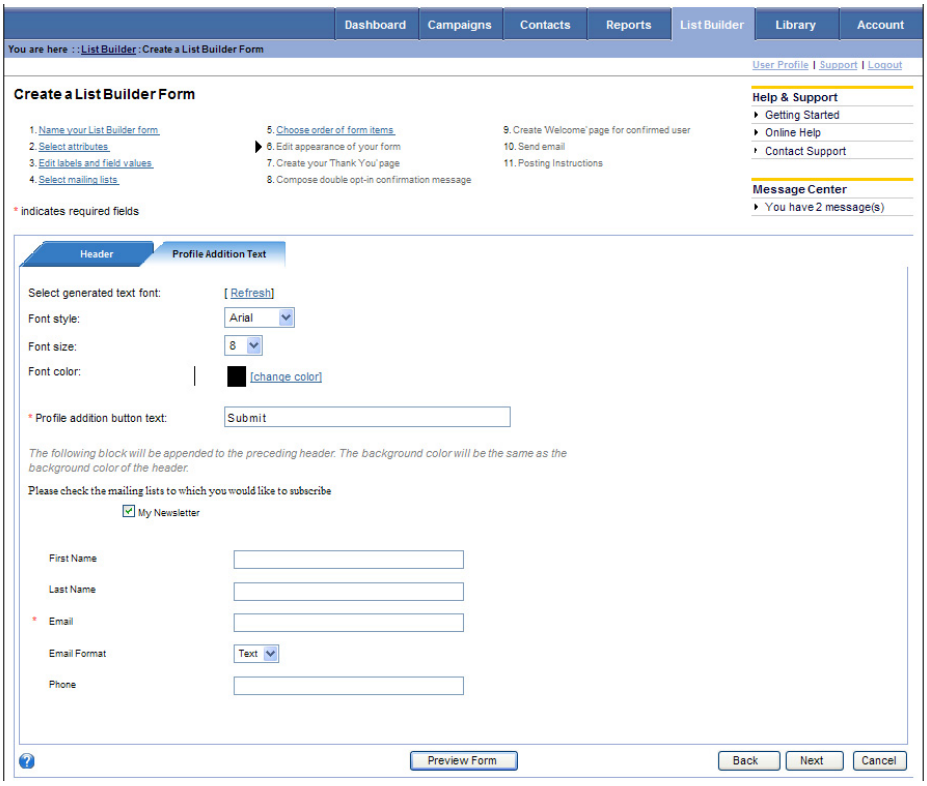
8. Select the mailing lists to which contacts will automatically be subscribed, or give contacts the option to choose from a selection of mailing lists. You can customize the prompting message in the **Message Text** box provided. Preview the appearance of the form by clicking **Preview Form**.
9. Click **Next**. The **Choose order of form items** page is displayed.



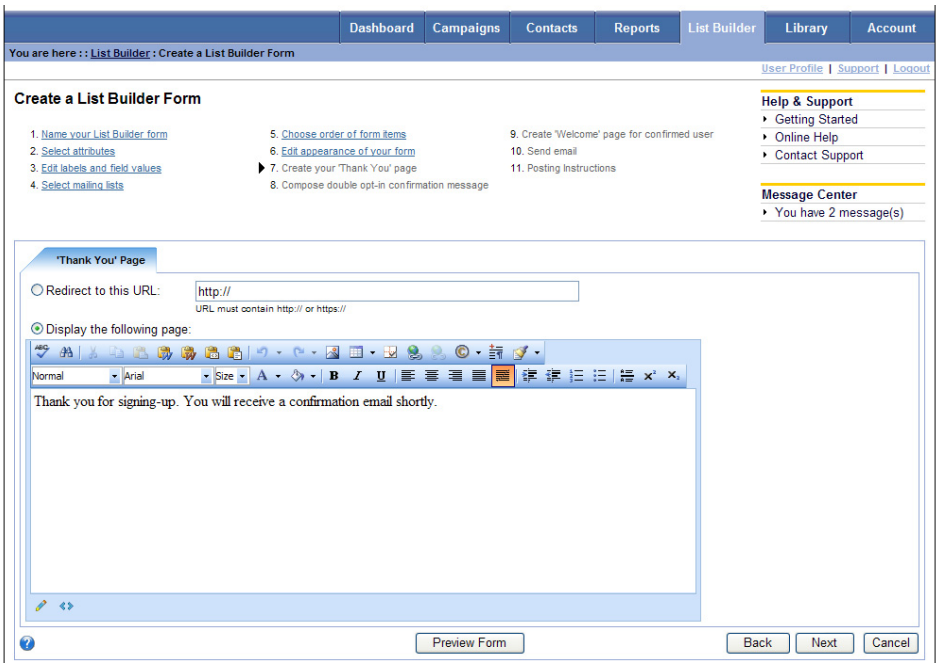

10. Highlight an item and use the up/down arrows to place it in the order you would like it to appear on the form. Preview the appearance of the items in your form by clicking **Preview Form**.
11. Click **Next**. The **Edit appearance of your form** page is displayed.



The WYSIWYG editor features two tabs. The first tab, labeled **Header**, allows you to edit the appearance of the header portion of the List Builder form. The **Profile Addition Text** tab allows you to format the font style, size and color for the fields that will appear in the form. The text of the submit button on the form can also be modified in the **Profile addition button text:** box. The bottom half of this tab displays the form body layout.

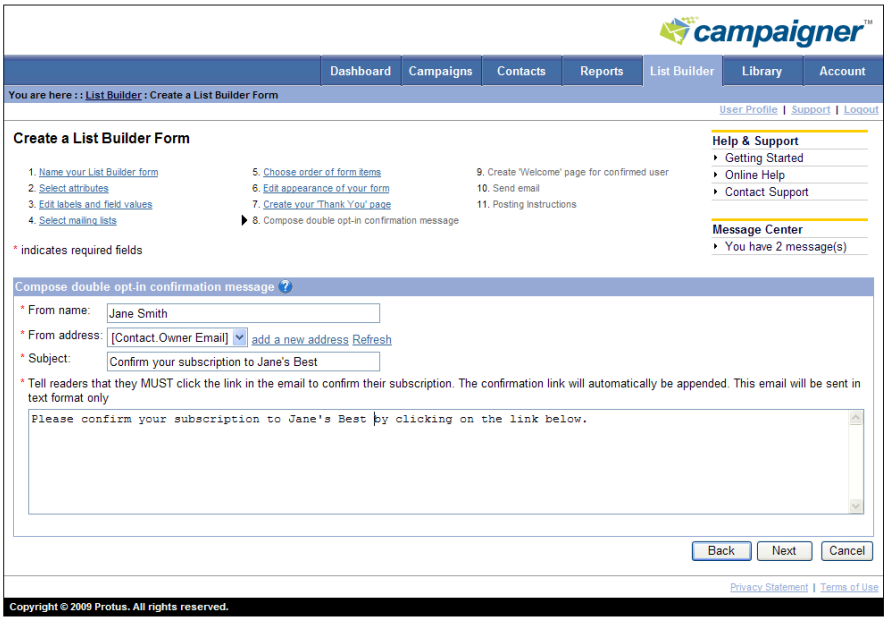



12. Preview the appearance of your form by clicking **Preview Form**.
13. Click **Next**. The **Create your 'Thank You' page** is displayed. The new subscriber will see this page after submitting the form.




14. Use the radio buttons to redirect the contact to a URL or to display a thank you page which you can customize with the WYSIWYG HTML editor. Click **Preview Form** to see the Thank you page.
15. Click **Next**. The **Compose double opt-in confirmation message** page is displayed.

This email message is automatically sent to confirm the subscriber's request to opt-in to your mailing list(s). A link in the email allows subscribers to confirm their email address, add them to your mailing list(s) and change their contact status from '**Pending**' to '**Subscribed**' in the Contacts database.


Dashboard
Campaigns
Contacts
Reports
List Builder
Library
Account
You are here : : List Builder : Create a List Builder Form
User Profile | Support | Logout
Create a List Builder Form
1. Name your List Builder form
2. Select attributes
3. Edit labels and field values
4. Select mailing lists
5. Choose order of form items
6. Edit appearance of your form
7. Create your 'Thank You' page
8. Compose double opt-in confirmation message
9. Create 'Welcome' page for confirmed user
10. Send email
11. Posting Instructions
Help & Support
Getting Started
Online Help
Contact Support
Message Center
You have 2 message(s)
* indicates required fields
Compose double opt-in confirmation message
* From name:
Jane Smith
* From address:
[Contact.Owner Email]
add a new address
Refresh
* Subject:
Confirm your subscription to Jane's Best
* Tell readers that they MUST click the link in the email to confirm their subscription. The confirmation link will automatically be appended. This email will be sent in text format only
Please confirm your subscription to Jane's Best by clicking on the link below.
Back
Next
Cancel
Privacy Statement | Terms of Use
Copyright © 2009 Protus. All rights reserved.

The following information is required for the confirmation email:

a) Enter the **From name**. This will be seen as the sender of the email message when received by the new subscriber. Choose a name that the new subscriber will recognize and feel comfortable opening. The **Send on Behalf of** feature allows this field to be populated with contact attribute wildcards, such as [Contact.Firstname].

b) Select the **From address** from the drop down list. The **From address** is an email address that has been validated by Campaigner. The **Send on Behalf of** feature allows this field to be populated with the [Contact.Owner.Email] wildcard.

**Add a new address**

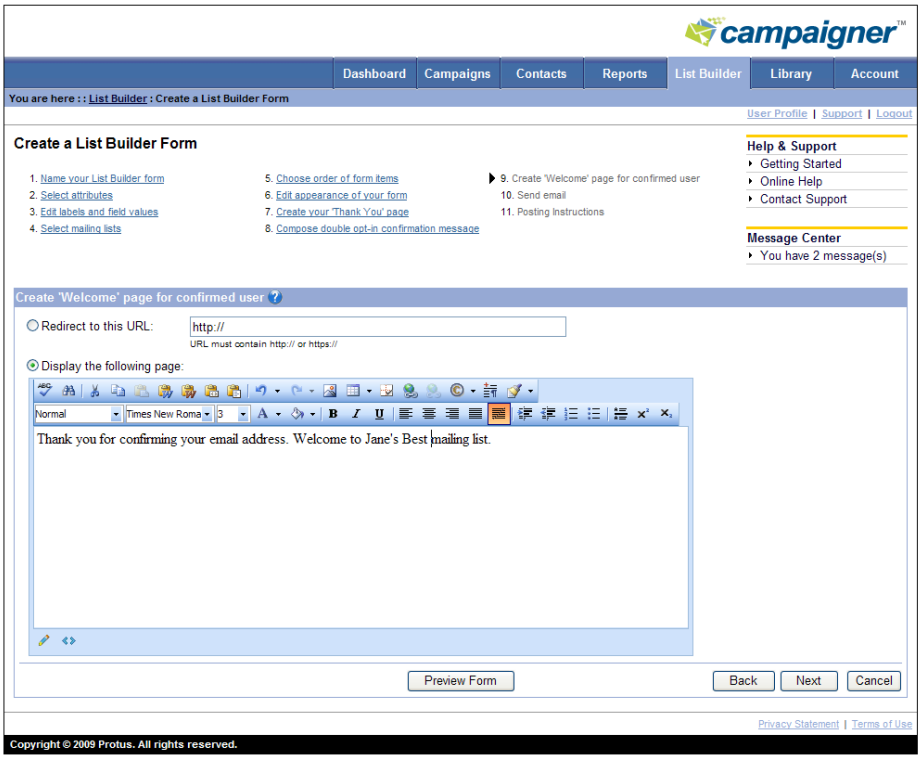
i. Click on **add a new address**. A dialog window pops-up.

ii. Enter an email address and click **Submit**. A confirmation email is sent to that email address requesting confirmation. Campaigner will update the list of available **From addresses** upon receipt of confirmation. Click **Refresh** to see the validated email address in the list.

c) Enter a **Subject** for the confirmation message.

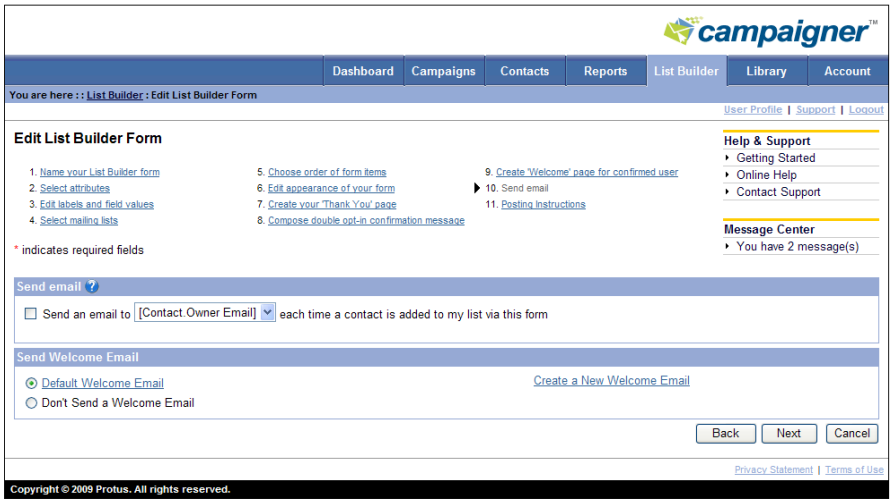
d) Enter the **Message Body** for your confirmation message. It is important that your message clearly tells subscribers to click on the confirmation link to validate their subscription request.

16. Click **Next**. The **Create 'Welcome' page for confirmed user** page is displayed. This welcome page is displayed after the link in the confirmation email is clicked on.



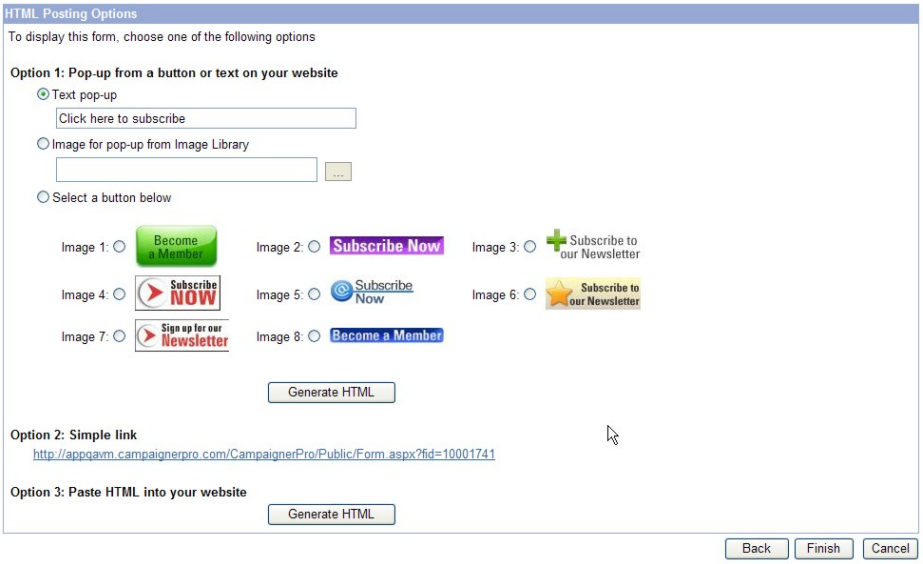

17. Choose whether to display the **Welcome** page or to redirect to a URL.

18. Click **Next**. The **Send notification email** page is displayed.

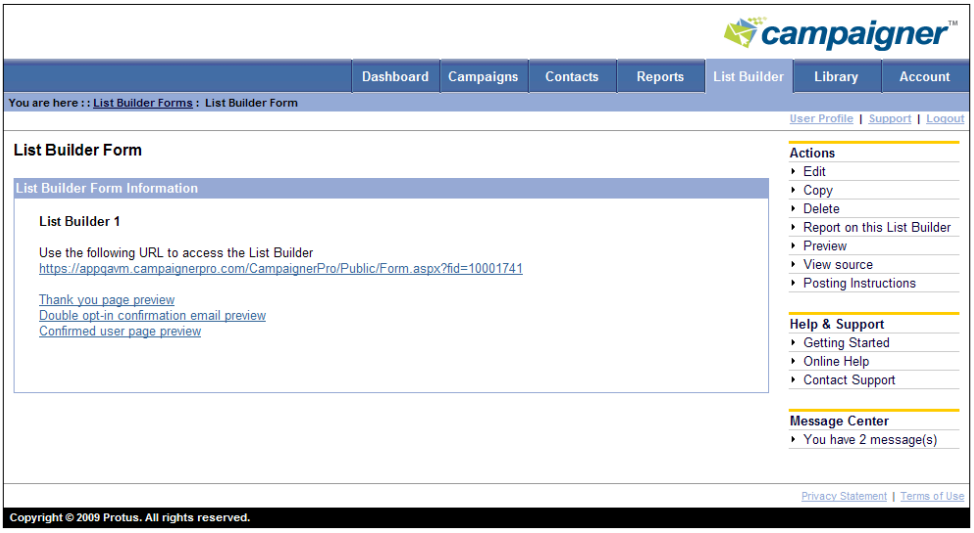

campaigner
Dashboard
Campaigns
Contacts
Reports
List Builder
Library
Account
You are here : : List Builder : Edit List Builder Form
User Profile | Support | Logout
Edit List Builder Form
1. Name your List Builder form
2. Select attributes
3. Edit labels and field values
4. Select mailing lists
5. Choose order of form items
6. Edit appearance of your form
7. Create your 'Thank You' page
8. Compose double opt-in confirmation message
9. Create 'Welcome' page for confirmed user
10. Send email
11. Posting Instructions
* indicates required fields
Help & Support
Getting Started
Online Help
Contact Support
Message Center
You have 2 message(s)
Send email
Send an email to [Contact Owner Email] each time a contact is added to my list via this form
Send Welcome Email
Default Welcome Email
Don't Send a Welcome Email
Create a New Welcome Email
Back
Next
Cancel
Privacy Statement | Terms of Use
Copyright © 2009 Protus. All rights reserved.

19. You can receive a notification email every time a contact submits a form and confirms their subscription. The notification email displays all of the fields in the form. Select the checkbox and the email address to send to.
20. Choose to **Send Welcome Email** using the radio buttons. You can customize the Default Welcome Email or create your own for multiple List Builder forms.
21. Click **Next**. The **Posting Instructions** page is displayed.

    You have 3 options for posting subscriber instructions:
    1. Pop-ups – Select the radio button for **Text**, an **Image** or a **Button** icon. Click **Generate HTML** to get code to use on your website. This link will pop open the List Builder form window.
    2. Simple Link – Copy the Simple Link and paste it on your website or in your email. Clicking on this will pop open the List Builder form window.
    3. HTML code – Embed the List Builder form directly into your web page.



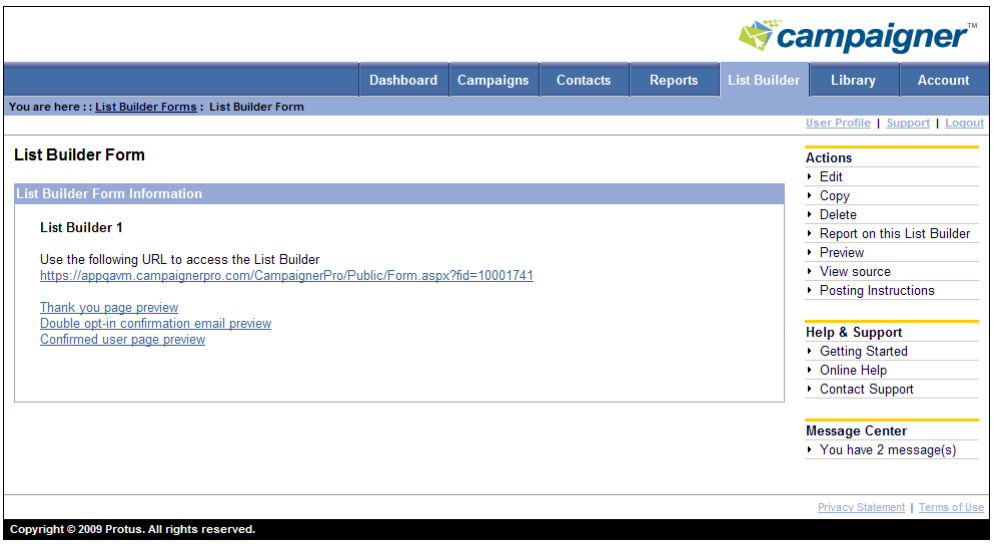
22. Click on a **Generate HTML** button. A window will pop-up listing the HTML code and posting instructions.
23. Click **Finish**. The **List Builder Information** page is displayed.




## Managing List Builder Forms

### Accessing Form Information

1. From the **List Builder** tab, click on the form you would like to access. The **List Builder Form Information** page is displayed.




2. Click on the URL to preview the **List Builder** form, or click on the **Preview** Action. Click on the Thank You, Opt-in Email or Confirmation link to review those items.
3. From the **Actions** menu, you can also copy the form, delete it, see the report for it, and view the HTML source code for it.

4. The **Edit List Builder Form** wizard are the same as the **Create a list Builder Form** wizard.
5. Click **Posting Instructions** to see the form's source code in a popup window. This code can be copied and pasted into your website.

**Note:** Campaigner cannot track how often a form is viewed if it is hosted on your website.

# Reports

The **Reports** tab displays:

**Contacts Report** - Displays the total number of contacts and summary of the status of contacts' email addresses. Statuses shown include the number of subscribed, soft bounce, hard bounce, unsubscribed, and pending.

**List Builder Forms** - Displays all forms which link to form specific report information.

**Report on Campaign Runs** - Displays all campaigns which link to campaign specific report information.

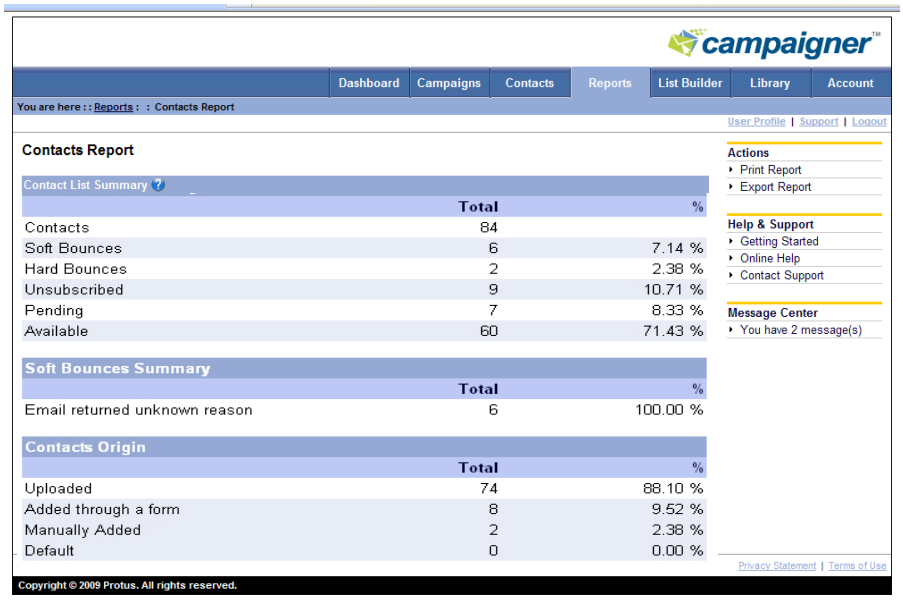
The **Action** menu also provides the following:

**Report on Mailing Lists** - Displays all campaigns which link to campaign specific report information.

**Report on Workflows** - Displays all campaigns which link to campaign specific report information. Workflows are an optional feature. Refer to the **Campaigner Advanced Feature Guide** for more information.

## Report on Contacts

1. From the **Reports** tab, click on the **Report on Contacts** Action. The contacts report is displayed.



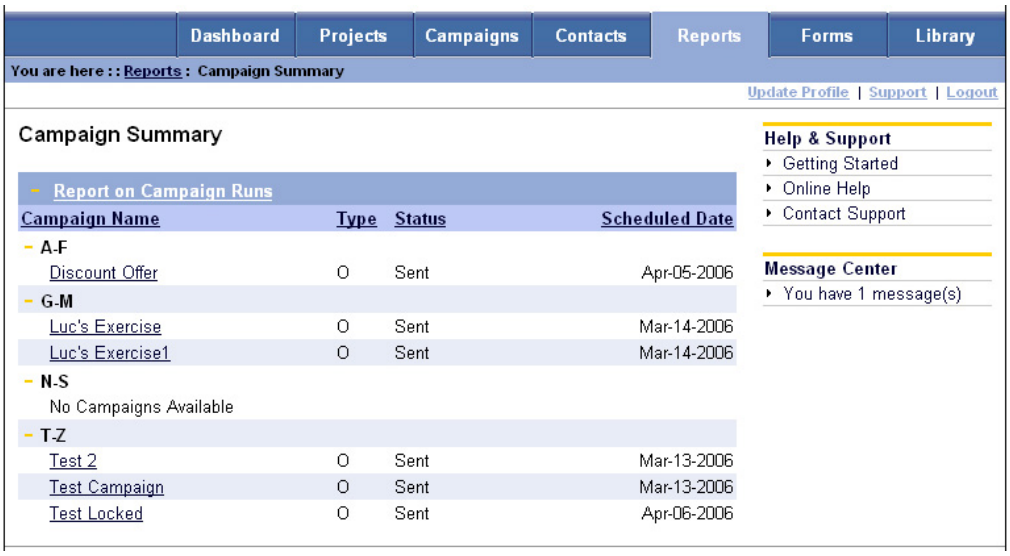

The Contacts Report shows:

- **Contacts Summary** with total number of contacts, and number and percent of contacts with a specific status,
- **Soft Bounce Summary** with the total number of emails that could not be delivered even though the contact's email address was valid,

- **Contacts Origin** with the total number of contacts, grouped by the method each was added to your list.

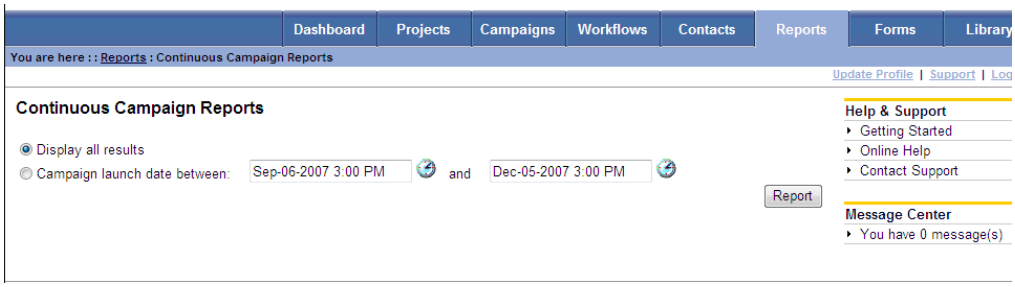
## Report on Campaigns

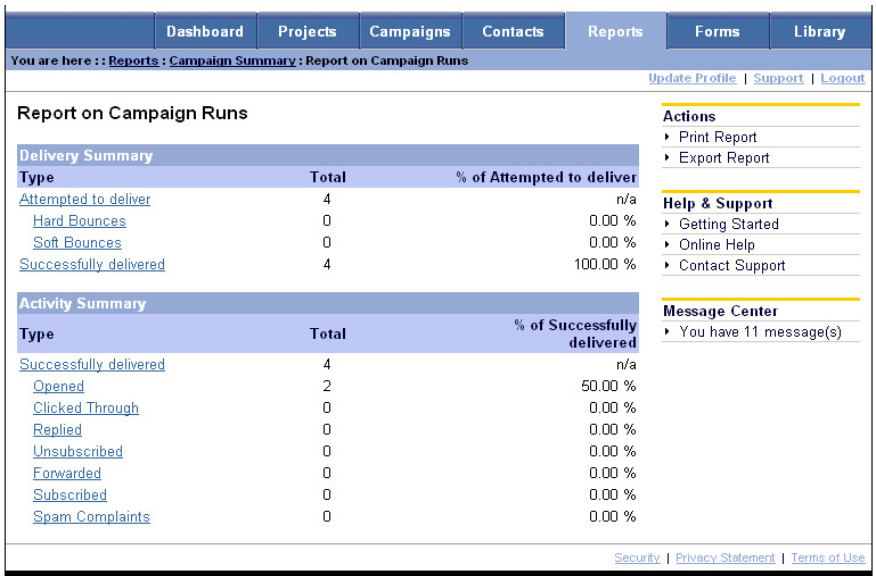
1. From the **Reports** tab, click on the **Report on Campaign Runs** Action. The **Campaign Summary** page is displayed.




**Note**: The list can be sorted by clicking the column headings. Type includes:
R = Recurring,
O = One-time,
C = Continuous

2. Select a campaign to run a report. If you chose a continuous campaign the date range selector is shown. Click on **Report.** The **Report on Campaign Runs** page is displayed.

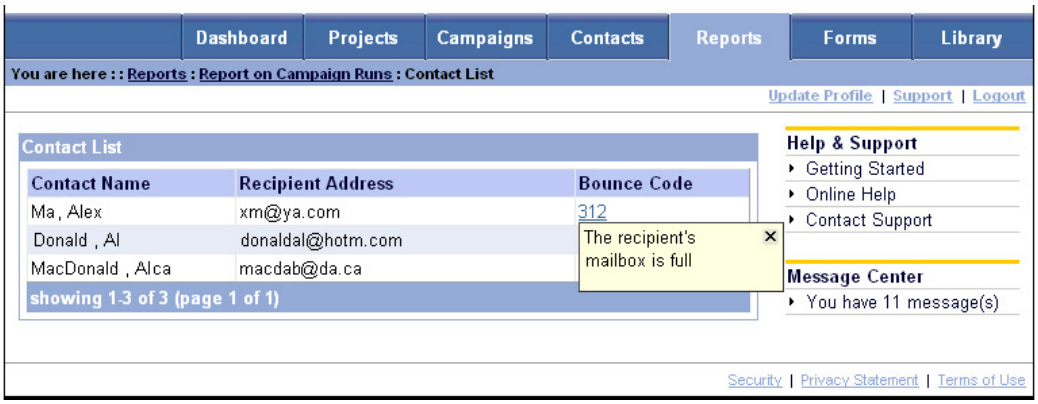





**Note**: It is not possible to always detect if a text email was opened. Campaigner does detect if a recipient clicked on a link in an email, replied, unsubscribed, forwarded, or subscribed.

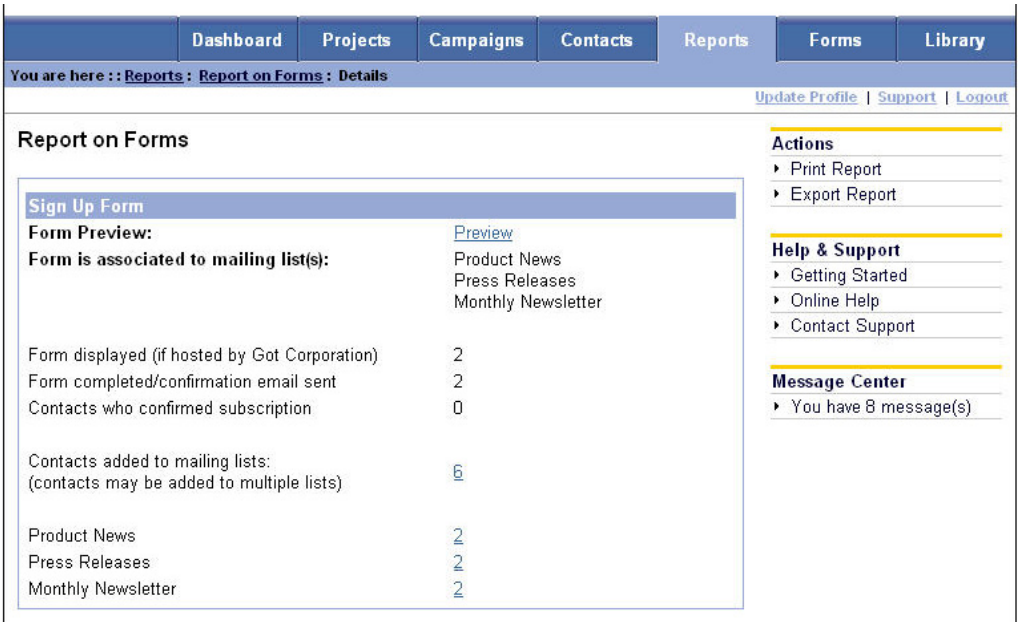
| Report Content | Type | Description |
|---|---|---|
| Delivery Summary | Attempted to deliver | The number of emails sent. |
| | Hard Bounces | The email addresses that were invalid. |
| | Soft Bounces | The email addresses that were temporarily not accessible. |
| | Successfully delivered | The email addresses did not soft or hard bounce. |
| Activity Summary | Successfully delivered | The email addresses did not soft or hard bounce. |
| | Opened | The contacts who opened, clicked, replied, unsubscribed, forwarded, or subscribed. |
| | Clicked Through | The contacts who clicked on a link in the email. |
| | Replied | The contacts who replied to the email. |
| | Unsubscribed | The contacts who unsubscribed from a mailing list. |
| | Forwarded | The contacts who forwarded the email to a friend. |
| | Subscribed | The new contacts who subscribed to a mailing list. |
| | Spam Complaints | The contacts who reported the email as spam. |

5. Click on one of the **Type** labels to view a list of the contacts that fall into that type. Both *Hard Bounces* and *Soft Bounces* display clickable bounce codes with an explaination.




## Report on Forms

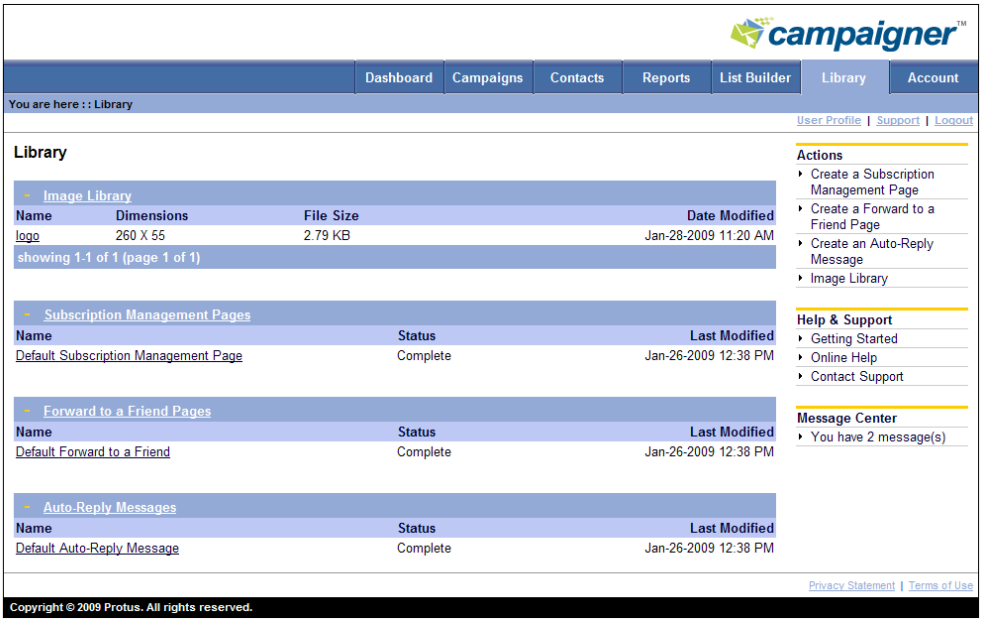
1. From the **Reports** tab, click on the **Report on List Builder Forms** Action. The **Report on List Builder Forms** page is displayed.
2. Click on the form name to generate and view a report.




| Report Content | Description |
|---|---|
| Form Preview | A link to preview the online form. |
| Form is associated to mailing list(s) | All the mailing lists with which the form is associated. |
| Form displayed (if hosted by this application) | Number of times the form has been displayed. Only valid if the form is hosted by Campaigner and not hosted externally. |
| Form completed/confirmation email sent | Number of times the form has been completed. |
| Contacts who confirmed subscription | Number of contacts who have confirmed their subscription by clicking the link in the confirmation email. |
| Contacts added to mailing lists (contacts may be added to multiple lists) | Number of contacts who have been added to a list as a result of completing the form. |
| Associated mailing lists | Number of contacts who have signed up for each of the mailing lists associated with the form. |

# Library

The **Library** tab gives you access to **Subscription Management** pages, **Forward-to-a-Friend** pages, **Auto-Reply Messages** and the **Image Library**.

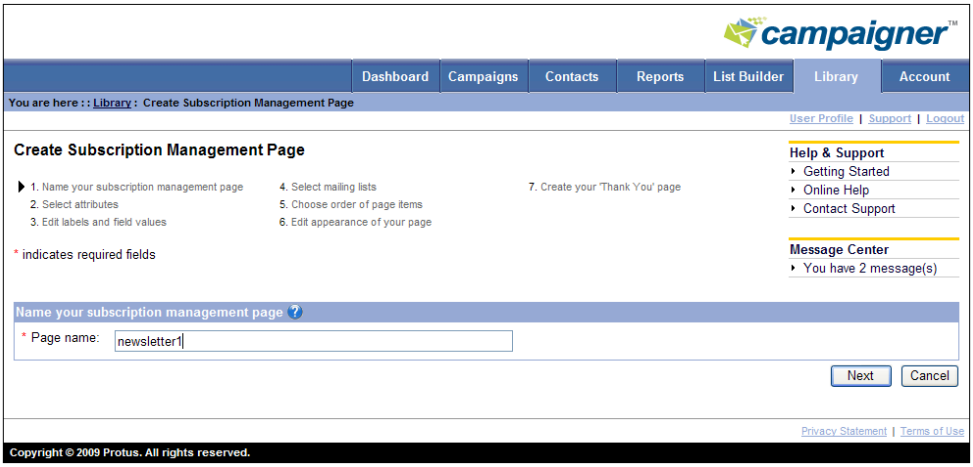



## Subscription Management Page

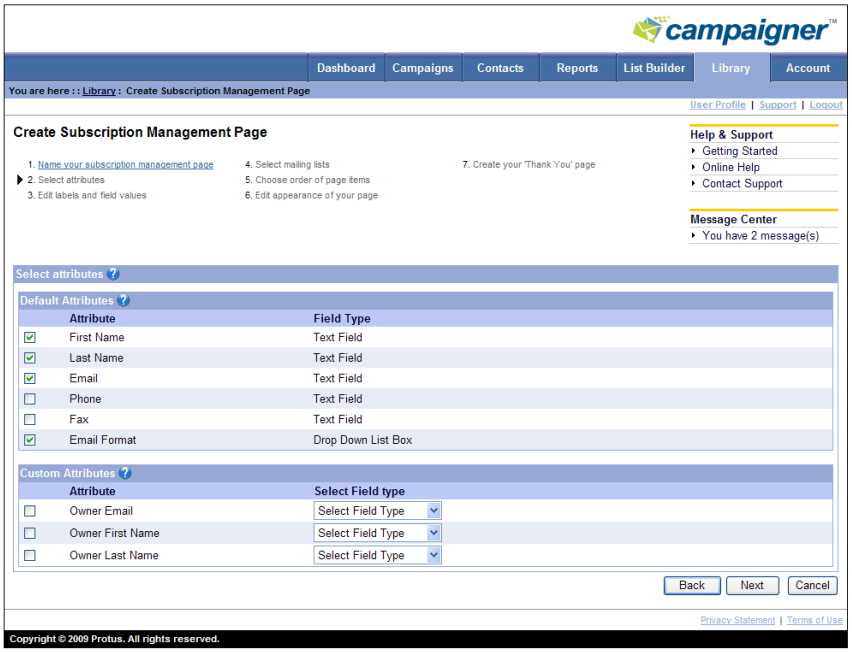
Every outgoing email includes a footer with an unsubscribe message that has a link to a **Subscription Management** page. Recipients can use a Subscription Management page to change personal attributes and mailing list preferences, or to unsubscribe entirely.

### Creating a Subscription Management Page

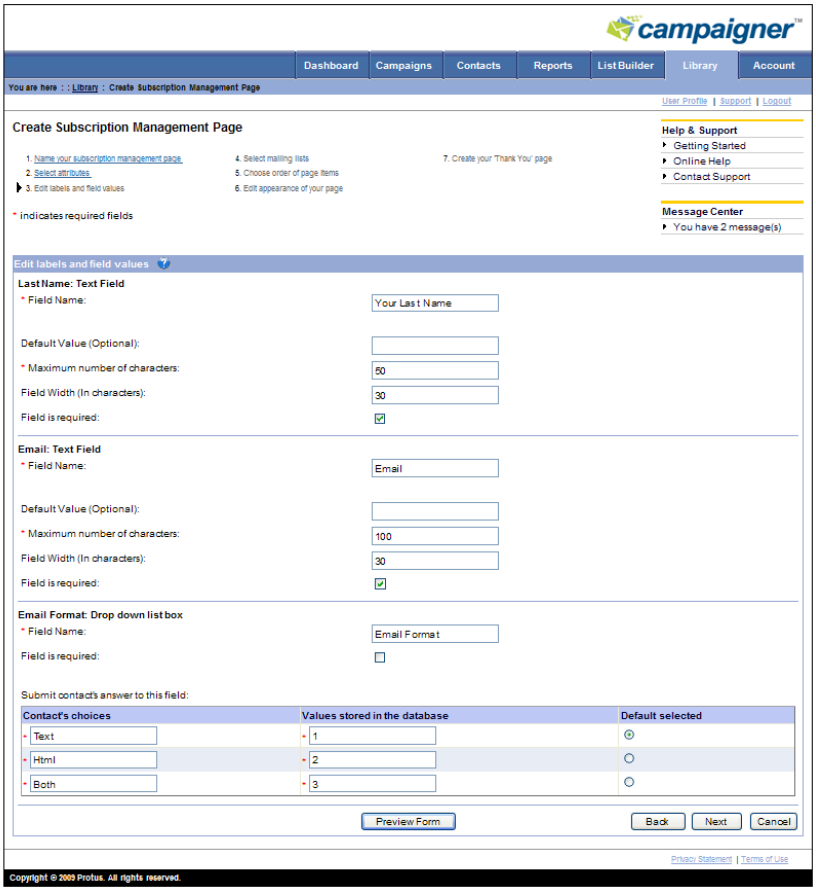
1. From the **Library** tab, click on the **Create a Subscription Page** Action. The **Name your subscription management page** is displayed.



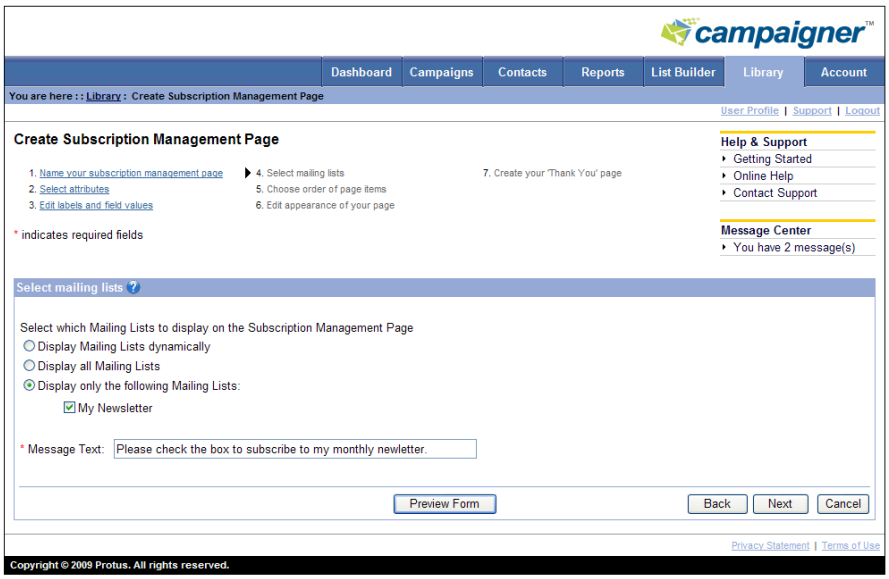
2. Enter the name in the **Page name** field.
3. Click **Next**. The **Select attributes** page is displayed.



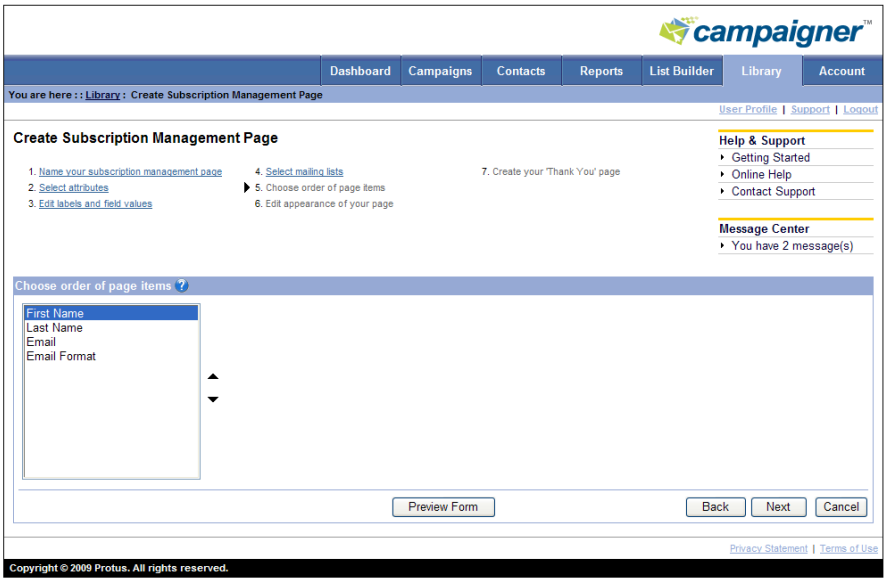

4. Select the default and custom attributes that you would like to allow contacts to change. Choose a field type for each custom attribute to ensure that the data is entered in the proper format.
5. Click **Next**. The **Edit labels and field values** page is displayed.



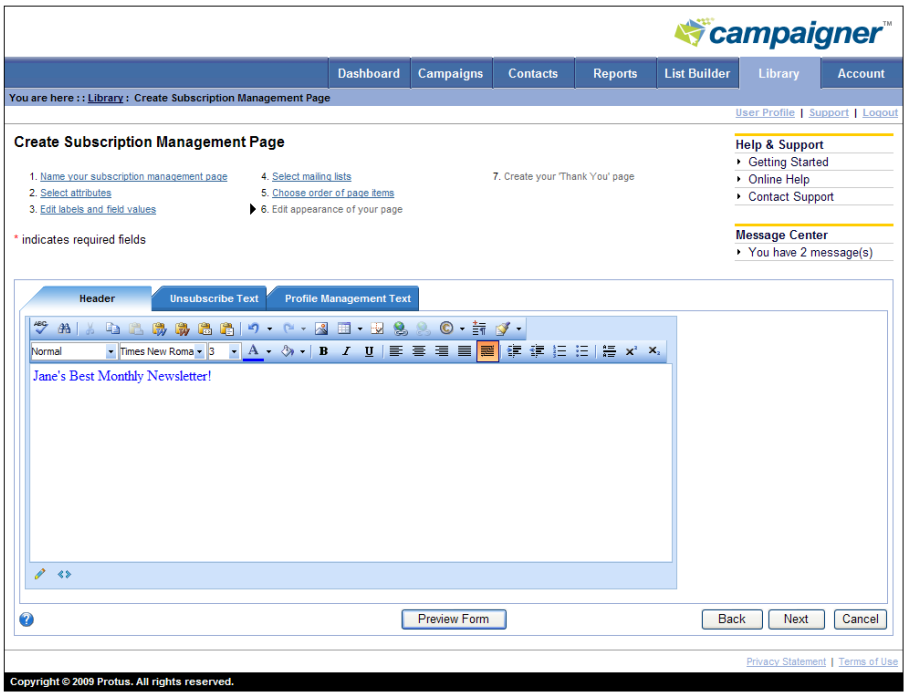

6. Edit the fields and attributes that will appear in the **Subscription Management** page. Preview the page by clicking the **Preview Form** button.
7. Click **Next**. The **Select mailing lists** page is displayed.



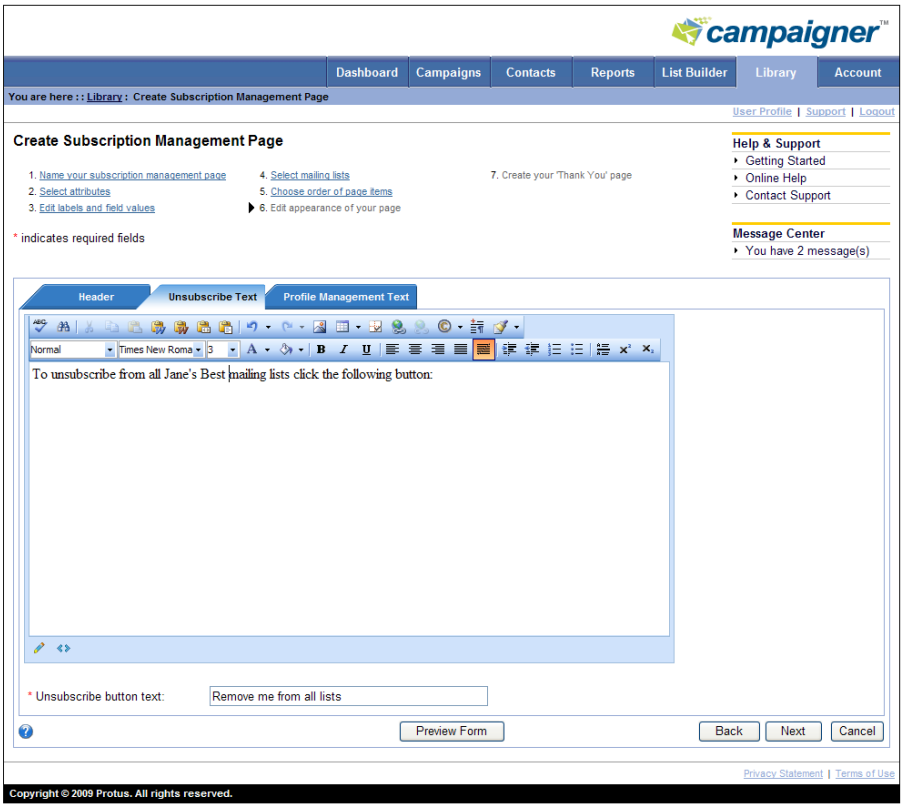
8. Check the mailing lists that you would like to appear on the subscription management page. If no mail lists are selected, this message will not be displayed. Edit the message prompts to mailing list subscribers.
9. Click **Next**. The **Choose order of page items** page is displayed.



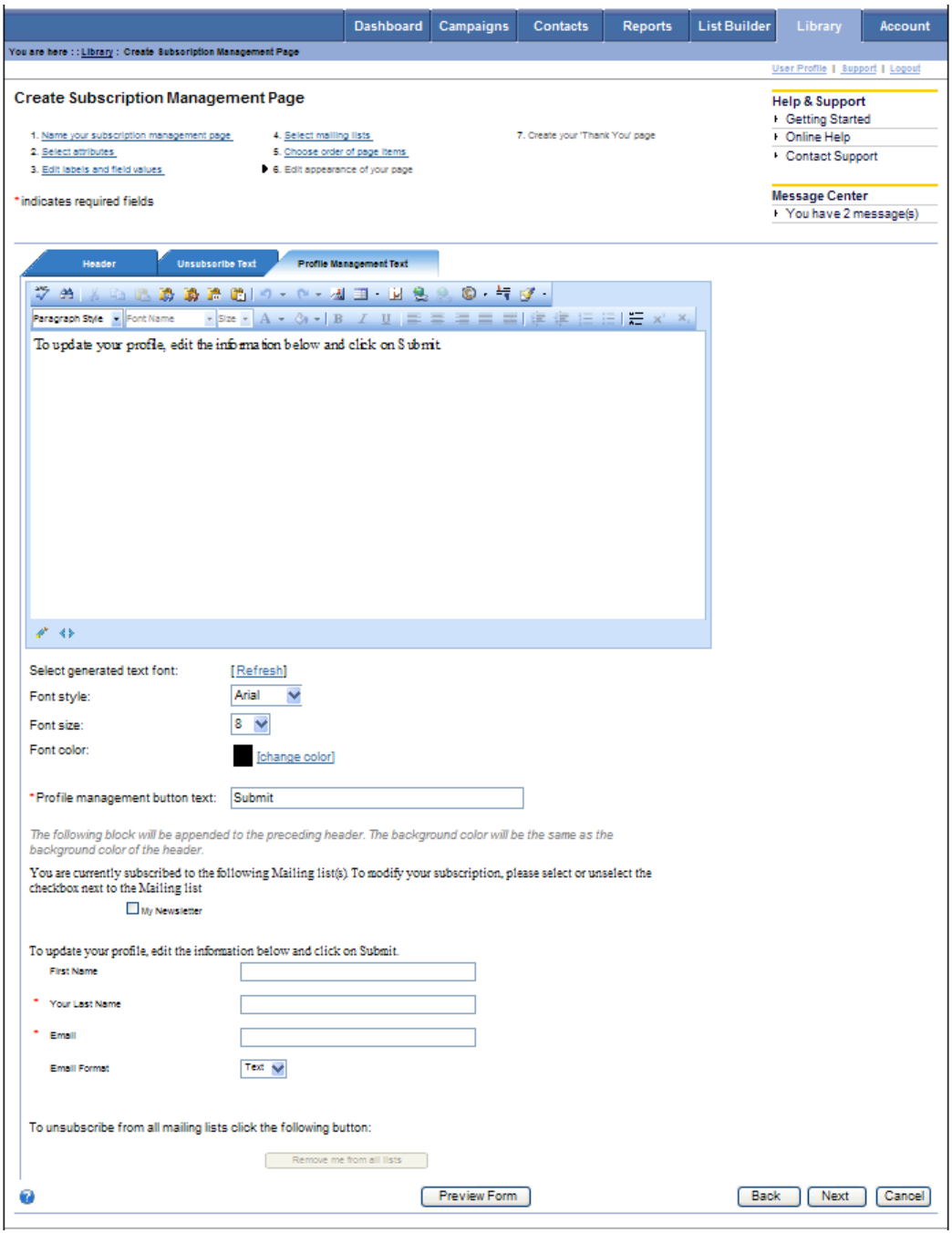

10. Select an item and use the up/down arrows to arrange its order on the page. Preview the page at any time by clicking **Preview Form**.
11. Click **Next**. The **Edit appearance of your page** is displayed.



12. Create a header using the WYSIWYG HTML editor in the **Header** tab. Click on the **Unsubscribe Text** tab when finished.

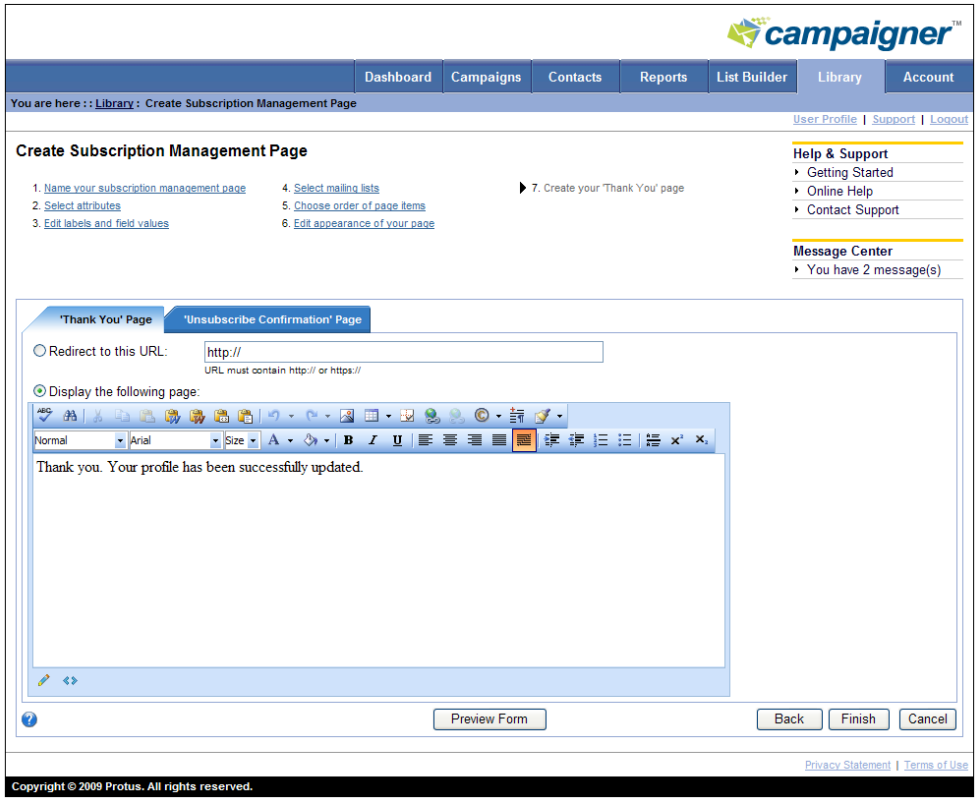



13. Edit the text for the unsubscribe message. Edit the unsubscribe button text in the **Unsubscribe button text:** window. Click on the **Profile Management Text** tab when finished.




14. There are three main sections in the **Profile Management Text** tab. Use the WYSIWYG editor to customize the text that will instruct users to modify their profile information. Below the editor, you can customize the font style, size and color for the button label that will appear on the page. In the **Profile management button text:** box, you can customize the text that appears on the submit button.
15. Click **Next**. The **Create your 'Thank You' page** is displayed. Contacts will be directed to the '**Thank You**' page after clicking on the submit button, and the '**Unsubscribe Confirmation**' page after clicking on the unsubscribe button. Use the radio buttons to choose whether to redirect to

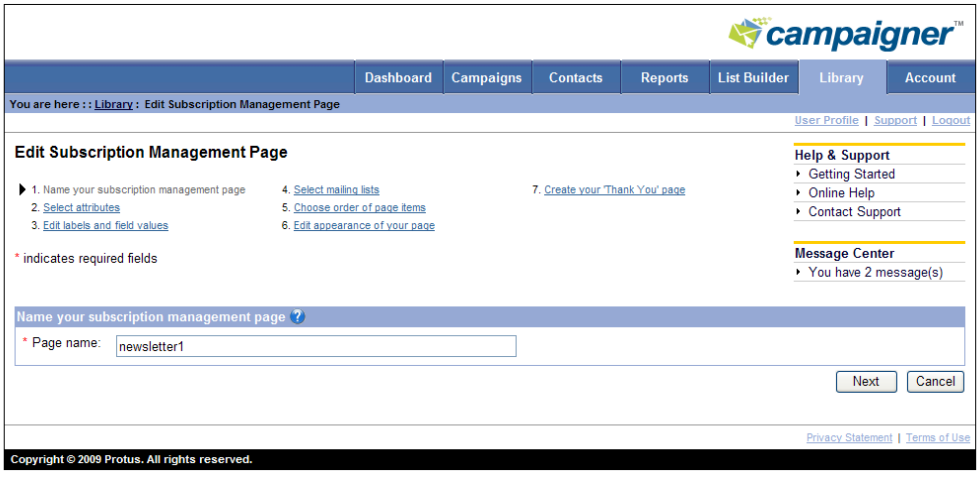
another URL, or customize one using the WYSIWYG HTML editor. Click **Preview** to see the pages.




16. Click **Finish**. The information page is displayed.

## Editing Subscription Management Pages

1. From the **Library** tab, click on the **Subscription Management** page you would like to edit. The information page is displayed.
2. Click on the **Edit** Action. The **Name your subscription management page** is displayed. The steps to edit a **Subscription Management** page are identical to those used to create one.



## Deleting a Subscription Management Page

1. From the **Library** tab, select the **Subscription Management** page to delete.
2. Click on the **Delete** Action. Click **OK** to delete. A popup window confirming deletion is displayed.
3. Click **OK** to return to the **Library** page.

## Previewing a Subscription Management Page

1. From the **Library** tab, select a **Subscription Management** page to preview.
2. Click on the **Preview** Action, or the link **Preview Subscription Management Page**. The form pops-up in a preview window.

**Sample Subscription Management Page Preview**

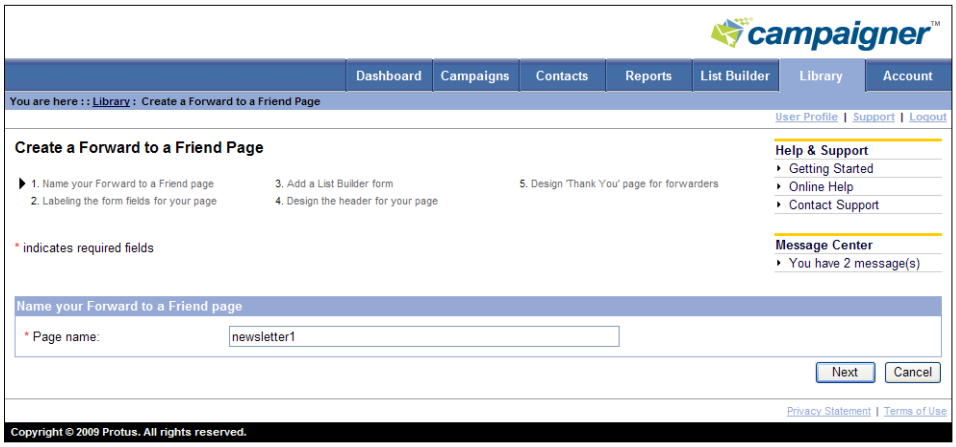
# Forward-to-a-Friend Pages

The **Forward-to-a-Friend** feature allows campaign recipients to send your email to their friends and associates, also known as viral marketing. Campaigner will track and report on the forwarding of a campaign email.

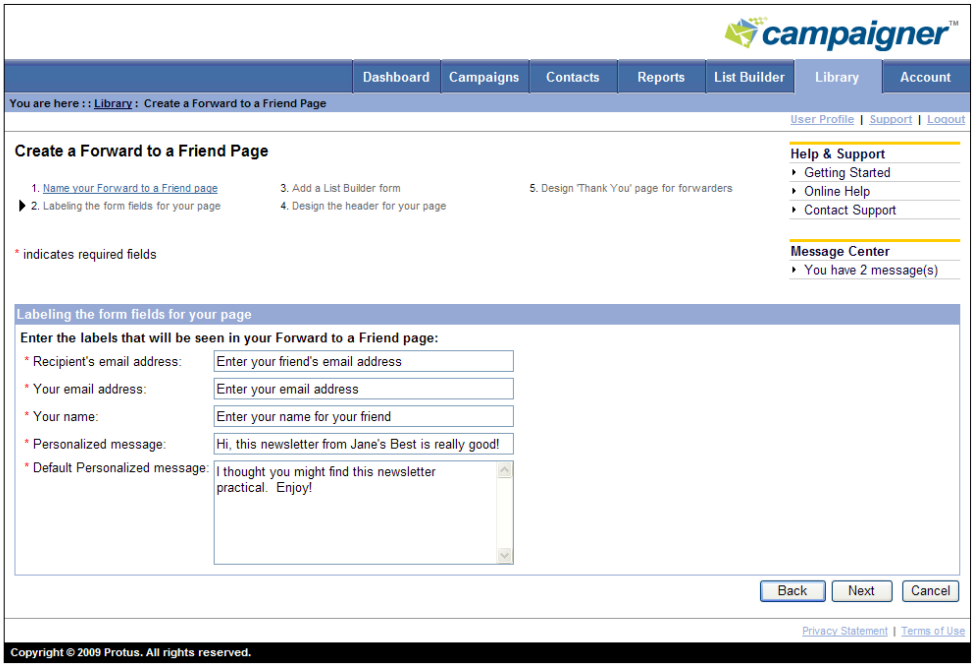
A **Forward-to-a-Friend** link can be added to an email during campaign creation/edit. When it is clicked on by recipients, a **Forward-to-a-Friend** window opens, asking the recipient to provide an email address and a note for their friend. The email that the friend will receive will resemble the original email from your campaign, with the addition of a note to the friend and a Mailing List subscription link in the footer of the email. The friend can then complete the double opt-in process to be added to the Mailing List.

## Creating a Forward-to-a-Friend Page

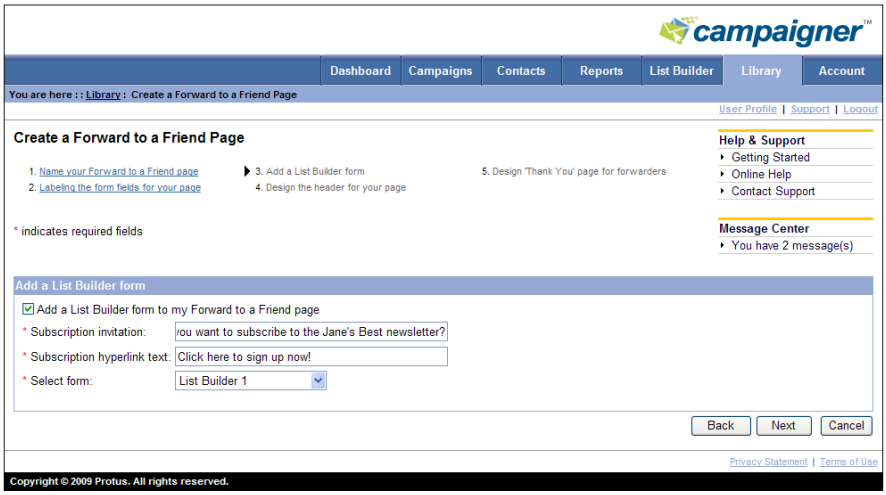
1. From the **Library** tab, click on the **Create a Forward to a Friend Page** Action. The **Name your Forward to a Friend page** is displayed.



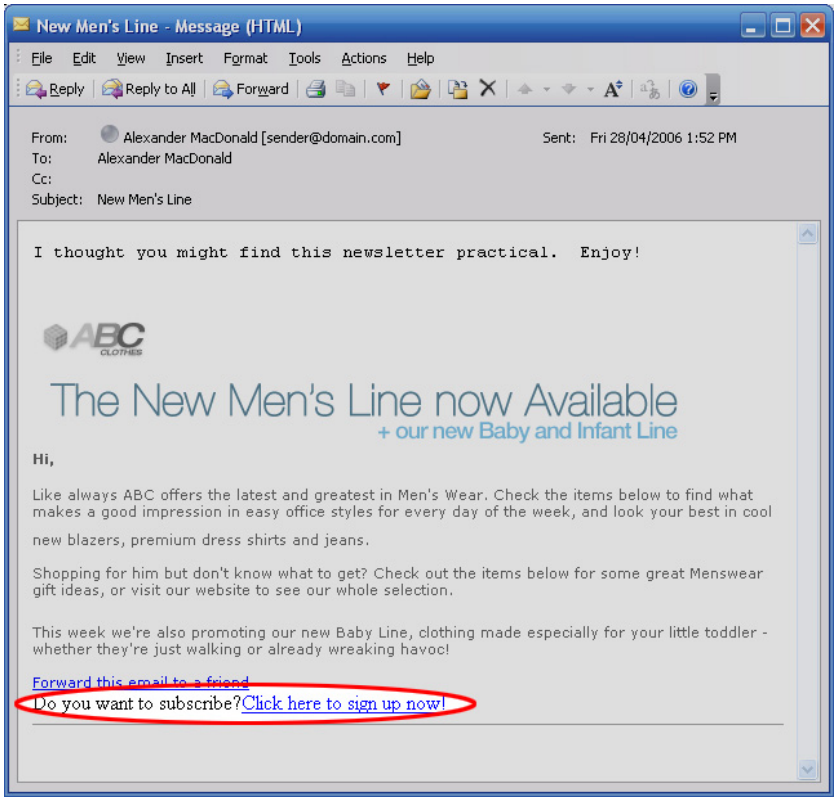

2. Enter the new **Forward-to-a-Friend** page's name. This will not be seen by recipients.
3. Click **Next**. The **Labeling the form fields for your page** is displayed. Labels will prompt the recipient to enter their name and email address, the email address of a friend, and a personal note into the corresponding textboxes.


campaigner
Dashboard
Campaigns
Contacts
Reports
List Builder
Library
Account
You are here : : Library : Create a Forward to a Friend Page
User Profile | Support | Logout
Create a Forward to a Friend Page
1. Name your Forward to a Friend page
2. Labeling the form fields for your page
3. Add a List Builder form
4. Design the header for your page
5. Design 'Thank You' page for forwarders
* indicates required fields
Help & Support
Getting Started
Online Help
Contact Support
Message Center
You have 2 message(s)
Labeling the form fields for your page
Enter the labels that will be seen in your Forward to a Friend page:
* Recipient's email address:
Enter your friend's email address
* Your email address:
Enter your email address
* Your name:
Enter your name for your friend
* Personalized message:
Hi, this newsletter from Jane's Best is really good!
* Default Personalized message:
I thought you might find this newsletter practical. Enjoy!
Back
Next
Cancel
Privacy Statement | Terms of Use
Copyright © 2009 Protus. All rights reserved.

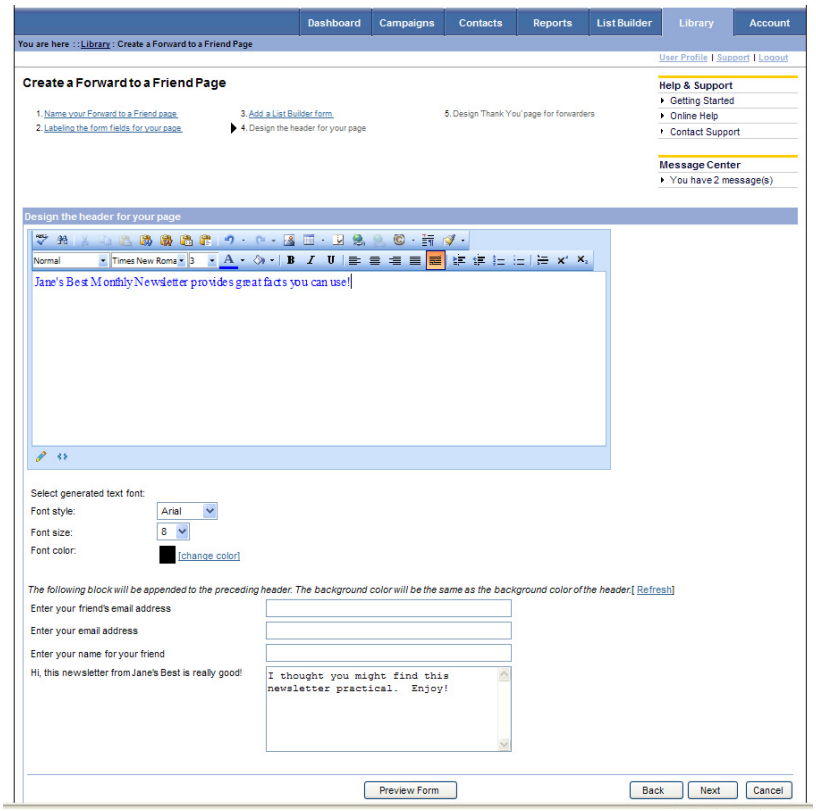
4. Click **Next**. The **Add a subscription form** page is displayed.


campaigner
Dashboard
Campaigns
Contacts
Reports
List Builder
Library
Account
You are here : : Library : Create a Forward to a Friend Page
User Profile | Support | Logout
Create a Forward to a Friend Page
1. Name your Forward to a Friend page
2. Labeling the form fields for your page
3. Add a List Builder form
4. Design the header for your page
5. Design 'Thank You' page for forwarders
* indicates required fields
Help & Support
Getting Started
Online Help
Contact Support
Message Center
You have 2 message(s)
Add a List Builder form
Add a List Builder form to my Forward to a Friend page
* Subscription invitation:
rou want to subscribe to the Jane's Best newsletter?
* Subscription hyperlink text:
Click here to sign up now!
* Select form:
List Builder 1
Back
Next
Cancel
Privacy Statement | Terms of Use
Copyright © 2009 Protus. All rights reserved.

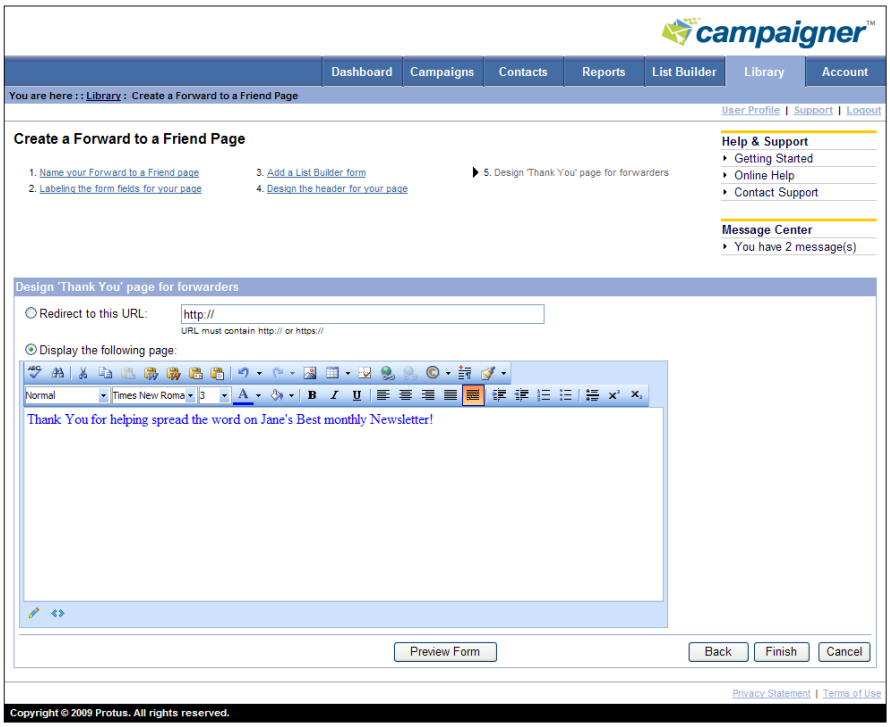
7. Use the checkbox to select whether or not you would like to include a link to a List Builder subscription form in all emails forwarded-to-a-friend. The link will give the friend an opportunity to sign up to mailing lists.


New Men's Line - Message (HTML)
File Edit View Insert Format Tools Actions Help
Reply Reply to All Forward
From: Alexander MacDonald [sender@domain.com]
Sent: Fri 28/04/2006 1:52 PM
To: Alexander MacDonald
Cc:
Subject: New Men's Line
I thought you might find this newsletter practical. Enjoy!
ABC
CLOTHES
The New Men's Line now Available
+ our new Baby and Infant Line
Hi,
Like always ABC offers the latest and greatest in Men's Wear. Check the items below to find what makes a good impression in easy office styles for every day of the week, and look your best in cool new blazers, premium dress shirts and jeans.
Shopping for him but don't know what to get? Check out the items below for some great Menswear gift ideas, or visit our website to see our whole selection.
This week we're also promoting our new Baby Line, clothing made especially for your little toddler - whether they're just walking or already wreaking havoc!
Forward this email to a friend
Do you want to subscribe?Click here to sign up now!

5. Click **Next**. The **Design the header for your page** is displayed.


Dashboard
Campaigns
Contacts
Reports
List Builder
Library
Account
You are here : : Library : Create a Forward to a Friend Page
User Profile | Support | Logout
Create a Forward to a Friend Page
1. Name your Forward to a Friend page
2. Labeling the form fields for your page
3. Add a List Builder form
4. Design the header for your page
5. Design 'Thank You' page for forwarders
Help & Support
Getting Started
Online Help
Contact Support
Message Center
You have 2 message(s)
Design the header for your page
Jane's Best Monthly Newsletter provides great facts you can use!
Select generated text font:
Font style:
Arial
Font size:
8
Font color:
[change color]
The following block will be appended to the preceding header. The background color will be the same as the background color of the header.[ Refresh]
Enter your friend's email address
Enter your email address
Enter your name for your friend
Hi, this newsletter from Jane's Best is really good!
I thought you might find this newsletter practical. Enjoy!
Preview Form
Back
Next
Cancel

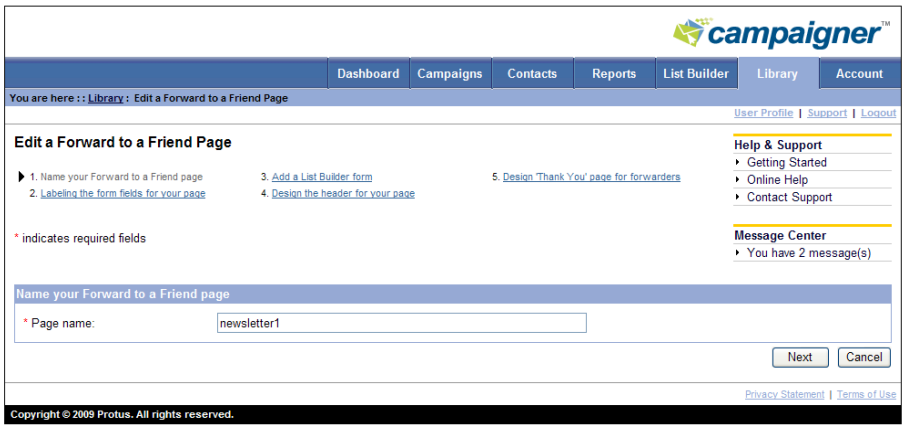
7. Create a header with the WYSIWYG HTML Editor and format the font style, size and color of the questions that will appear in the form.
8. Click **Next**. The **Design 'Thank You' page for forwarders** page is displayed. A **Thank You** page is displayed after the original campaign recipient completes and submits the **Forward-to-a-Friend** page. The radio buttons choose whether to customize your own Thank You page with the HTML editor, or redirect to an existing webpage.


campaigner
Dashboard
Campaigns
Contacts
Reports
List Builder
Library
Account
You are here : : Library : Create a Forward to a Friend Page
User Profile | Support | Logout
Create a Forward to a Friend Page
1. Name your Forward to a Friend page
2. Labeling the form fields for your page
3. Add a List Builder form
4. Design the header for your page
5. Design 'Thank You' page for forwarders
Help & Support
Getting Started
Online Help
Contact Support
Message Center
You have 2 message(s)
Design 'Thank You' page for forwarders
Redirect to this URL:
http://
URL must contain http:// or https://
Display the following page:
Thank You for helping spread the word on Jane's Best monthly Newsletter!
Preview Form
Back
Finish
Cancel
Privacy Statement | Terms of Use
Copyright © 2009 Protus. All rights reserved.

9. Click **Finish**. The information page is displayed.

## Managing Existing Forward-to-a-Friend Pages

1. From the **Library** tab, click on the name of the **Forward-to-a-Friend** page you would like to edit. The information page is displayed.
2. Click on the **Edit** Action. The **Name your Forward-to-a-Friend page** is displayed. The steps to edit a **Forward-to-a-Friend** page are identical to those to create one.




## Copying a Forward-to-a-Friend Page

1. From the **Library** tab, click on the **Forward-to-a-Friend Page** you would like to copy. The information page is displayed.

2. Click on the **Copy** Action. The **Copy Forward-to-a-Friend Page** is displayed.
3. Click **Next**. The confirmation page is displayed.
4. Click **Yes** to confirm. The success page is displayed.
5. Click **Continue** to be return to the **Library** tab.

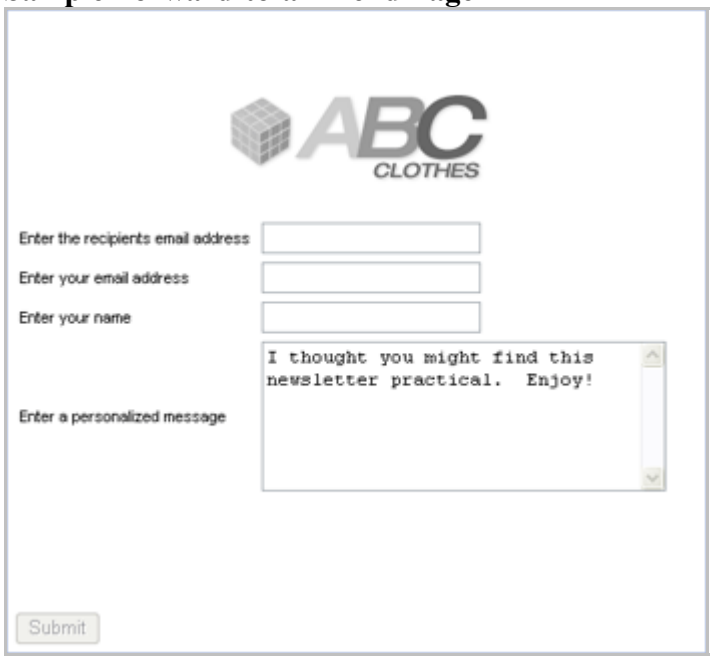
## Deleting a Forward-to-a-Friend Page

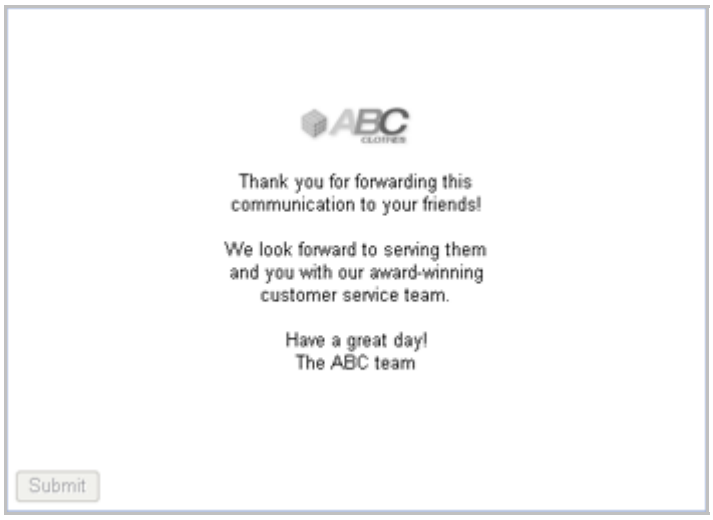
1. From the **Library** tab, click on the **Forward-to-a-Friend** page you would like to delete. The information page is displayed.
2. Click on the **Delete** Action. A window warning is displayed.
3. Click **OK** to delete the **Forward-to-a-Friend** page. A window confirming deletion is displayed.
4. Click **OK** to be return to the **Library** tab.

## Previewing a Forward-to-a-Friend Page

1. From the **Library** tab, click on the **Forward-to-a-Friend** page you would like to preview. The information page is displayed.
2. Click on the **Preview** Action or click on the **Preview Forward to a Friend Page** link. The page appears in a popup window.

**Sample Forward-to-a-Friend Page**



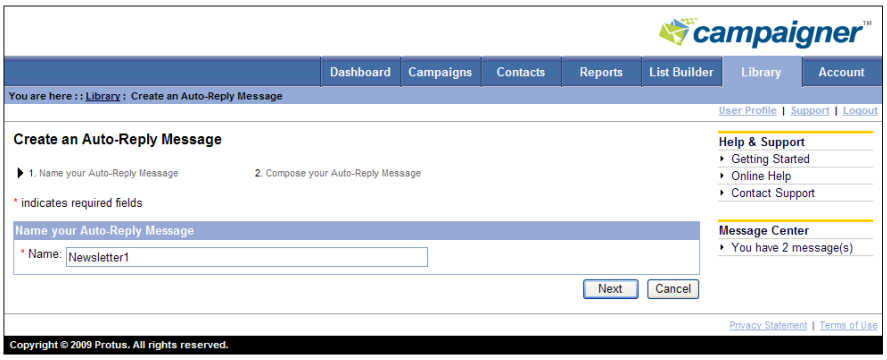

Thank you for forwarding this communication to your friends!
We look forward to serving them and you with our award-winning customer service team.
Have a great day!
The ABC team
Submit

## Auto-Reply Messages

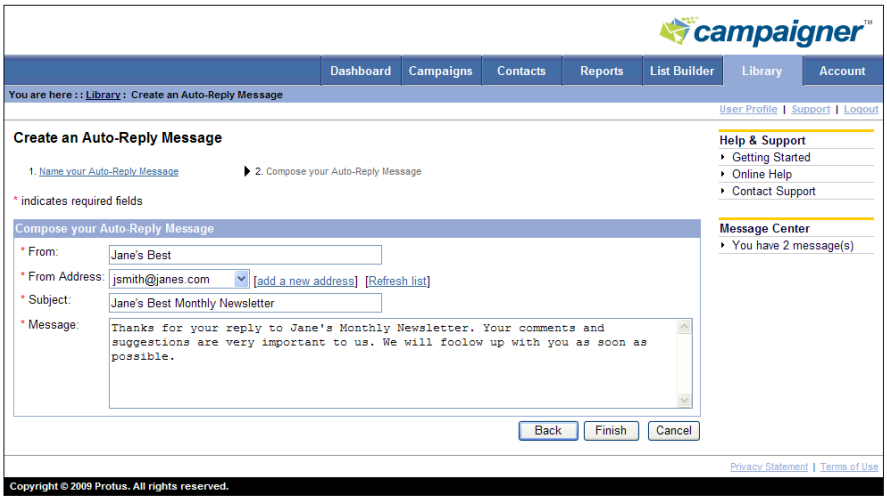
An auto-reply message can automatically be sent to recipients who reply to campaign emails. An auto-reply message can be included in campaigns during campaign creation.

### Creating Auto-Reply Messages

1. From the **Library** tab, click on the **Create an Auto-Reply Message** Action. The **Name your Auto-Reply Message** page is displayed.




2. Create a new auto-reply message's name. This will not be seen by recipients.
3. Click **Next**. The **Compose your Auto-Reply Message** page is displayed.




4. Enter the **From name** and **From Address**, as well as the message subject and body. The [Owner.Email] wildcard can be used as the **From Address**.
5. Click **Finish**. The information page is displayed.

## Editing Auto-Reply Messages

1. From the **Library** tab, click on the **Auto-Reply Message** you would like to edit. The information page is displayed.
2. Click on the **Edit** Action. The **Name your Auto-Reply Message** page is displayed.
3. The steps to edit an auto-reply message are exactly the same as those to create one.

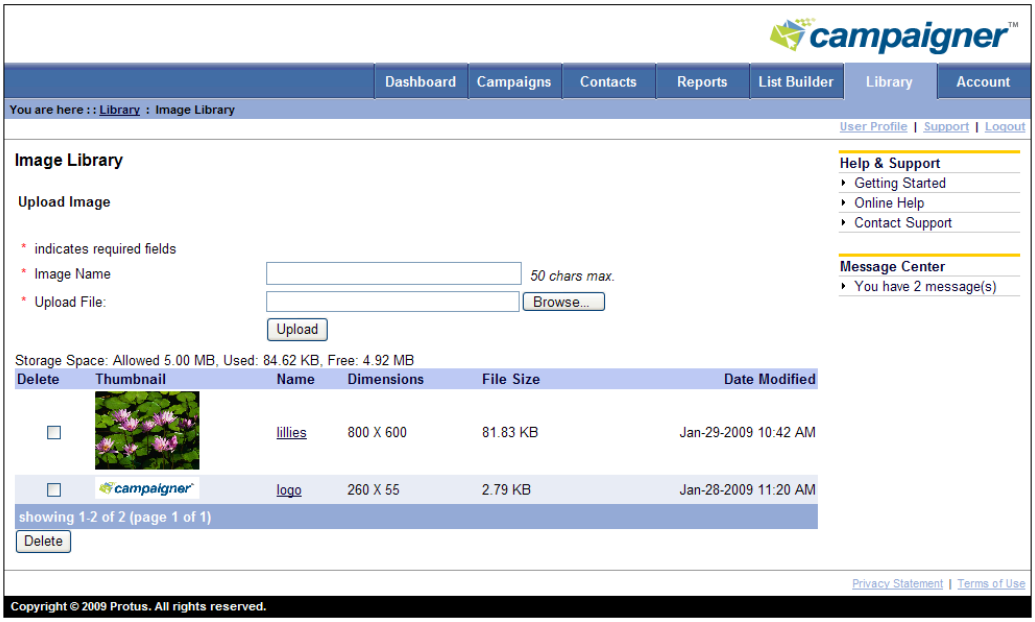
## Copying Auto-Reply Messages

1. From the **Library** tab, click on the auto-reply message you would like to copy. The information page is displayed.
2. Click on the **Copy** Action. The **Name your Auto-Reply Message** page is displayed.
3. Choose a name for the new message.
4. Click **Next**. The confirmation page is displayed.
5. Click **Yes** to confirm copying of the auto-reply message. The success page is displayed.
6. Click **Continue** to be redirected to the **Library** tab.

## Image Library

The image library allows you to upload and store images that can be used in email campaigns. The following file types can be uploaded to the image library:

- GIF
- JPEG / JPG
- SWF
- PNG
- PDF



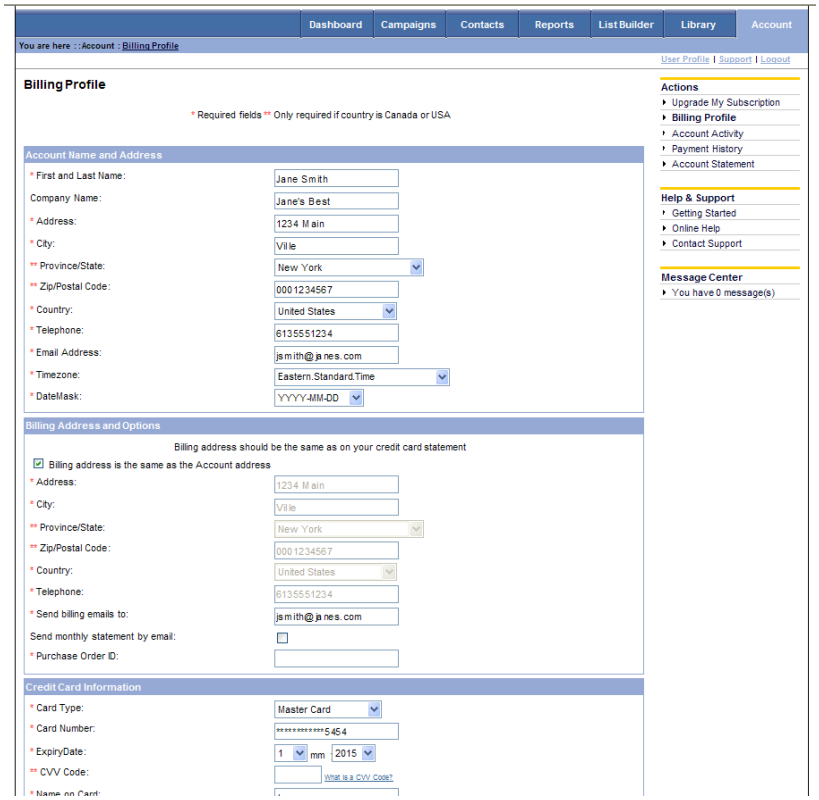

## View and Upload Images

1. From the **Library** tab, click on the **Image Library** Action. The **Image Library** page is displayed, providing an image upload function and listing your current images.
2. Click on the thumbnail to view its actual size in another window.
   Enter a name for the image. Click **Browse** to locate the file to upload.
3. Select the file and click **Open**.
4. Click **Upload**.

# Account Management

## Billing Information

1. From the **Account** tab, click on the **Billing Profile** Action.




You can view and change the **Account Name and Address**, and the **Billing Address** and **Credit Card Information**.

### Receiving Monthly Statements by Email

You can opt to receive your monthly statements by email, if you so wish. If you prefer not to receive them by email, you can always access your monthly statement online.

### Putting a Purchase Order Number on your Statement

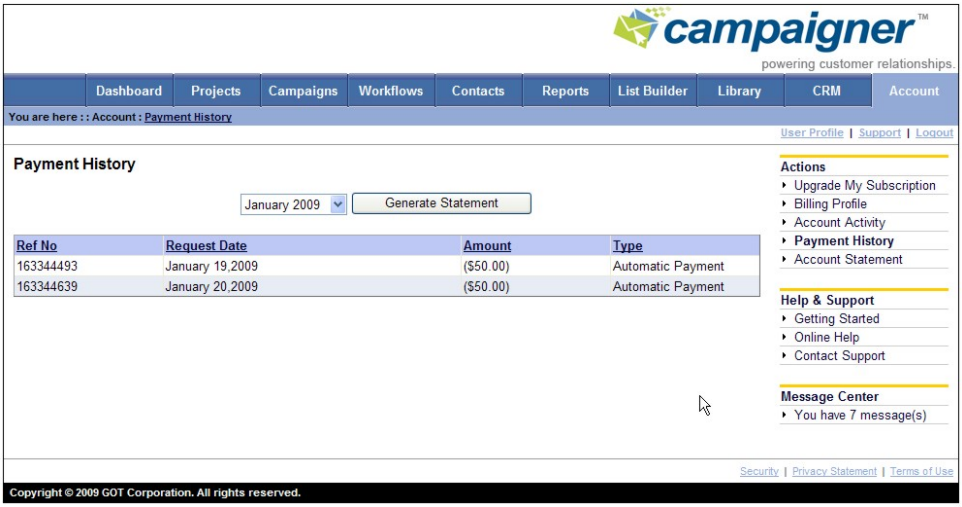
If you would like to track your Campaigner statements against a purchase order number, you can enter the purchase order number here, so that it appears on every statement.

Click **Save** to update the billing profile or **Cancel** to revert to the previous information.

## Payment History

Payment History provides a quick look at payments you have made in a given month.

1. Select the month for which you want to view your payment history from the drop-down list

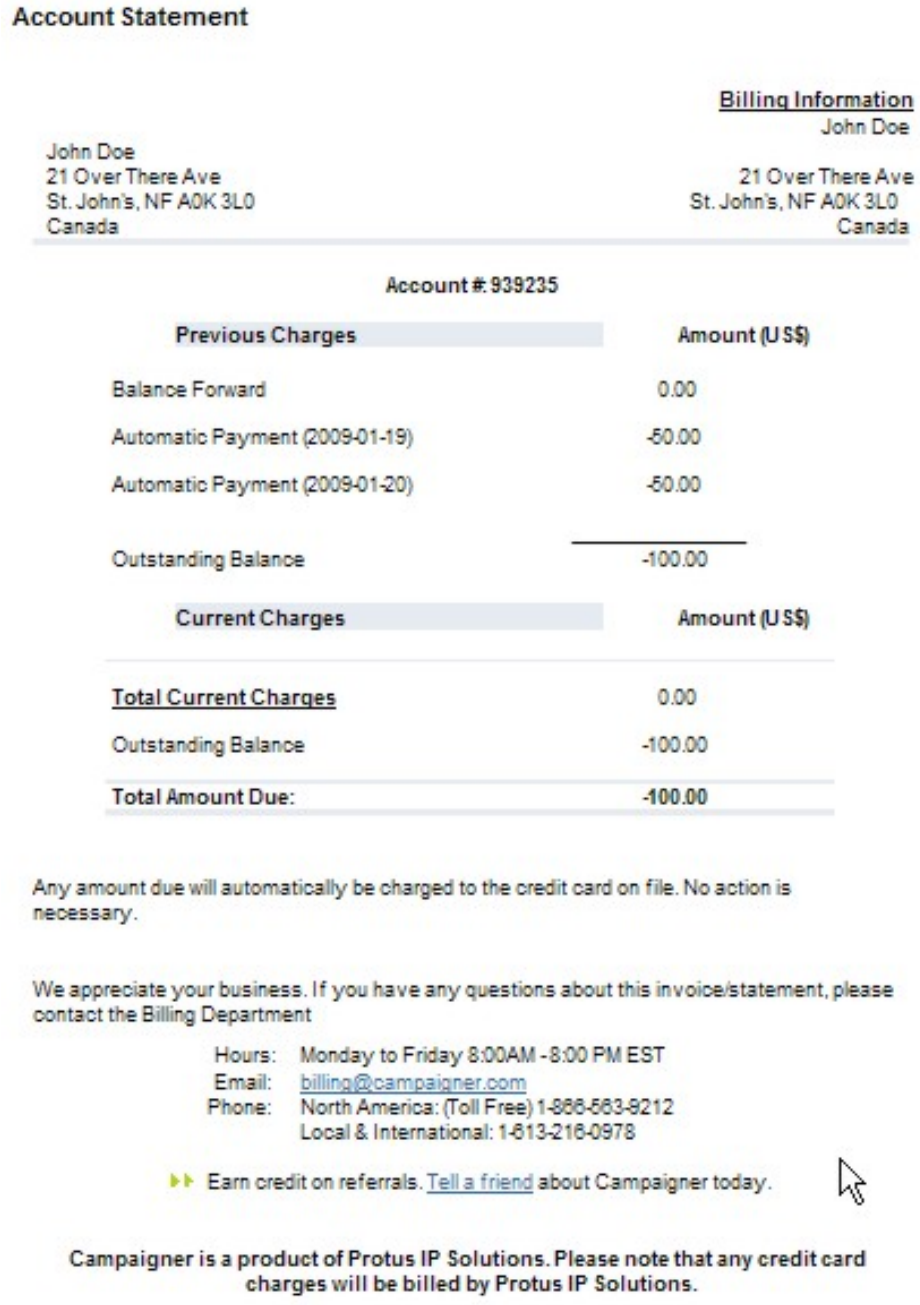



2. Click the **Generate Statement** button. The statement will appear in the screen

## Account Statement

You can retrieve your account statements online, up to 12 months in the past.

1. Select a month to filter on from the drop down menu. If a statement is available for the selected month, it will appear. Otherwise, you will see "No bills found for current user".



**Account Statement**

**Billing Information**
John Doe
21 Over There Ave
St. John's, NF A0K 3L0
Canada

John Doe
21 Over There Ave
St. John's, NF A0K 3L0
Canada

**Account #: 939235**

| Previous Charges | Amount (US$) |
|---|---|
| Balance Forward | 0.00 |
| Automatic Payment (2009-01-19) | -50.00 |
| Automatic Payment (2009-01-20) | -50.00 |
| Outstanding Balance | -100.00 |

| Current Charges | Amount (US$) |
|---|---|
| Total Current Charges | 0.00 |
| Outstanding Balance | -100.00 |
| **Total Amount Due:** | **-100.00** |

Any amount due will automatically be charged to the credit card on file. No action is necessary.

We appreciate your business. If you have any questions about this invoice/statement, please contact the Billing Department

Hours: Monday to Friday 8:00AM - 8:00 PM EST
Email: billing@campaigner.com
Phone: North America: (Toll Free) 1-866-563-8212
Local & International: 1-613-216-0978

Earn credit on referrals. Tell a friend about Campaigner today.

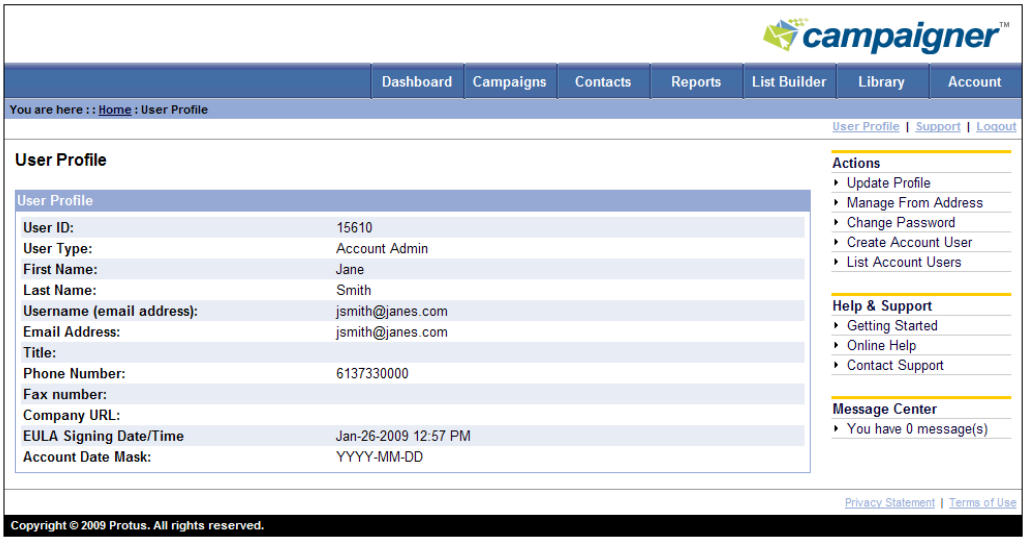
**Campaigner is a product of Protus IP Solutions. Please note that any credit card charges will be billed by Protus IP Solutions.**

1. Click the **Download** or **Print** button if you wish to download or print a copy of your statement.

## Manage User Profile and Account Settings

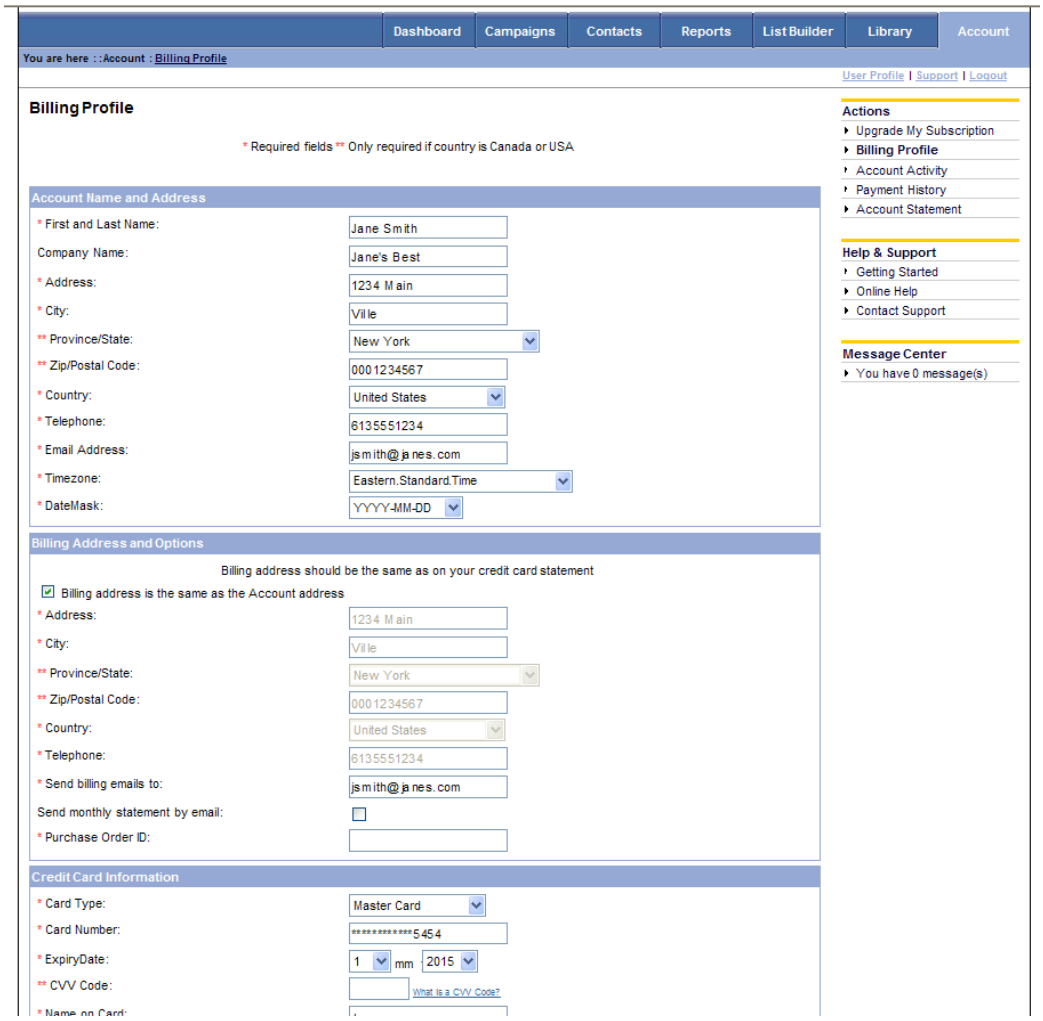
1. Click on **User Profile**

   You can make changes to your user profile, manage your **From address**, and change your system password. Account administrators can also create and list account users.



## Update Your Account and User Profile Information

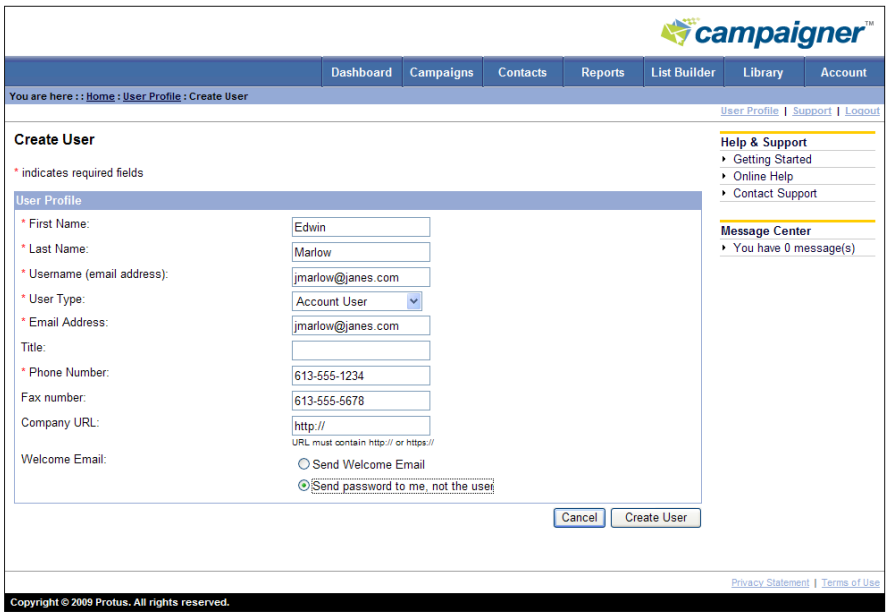
1. From the **User Profile** page, click on the **Update Profile** Action. The **Billing Profile** page is displayed.




2. Make your changes and click the **Save** button.

## Create an Account User

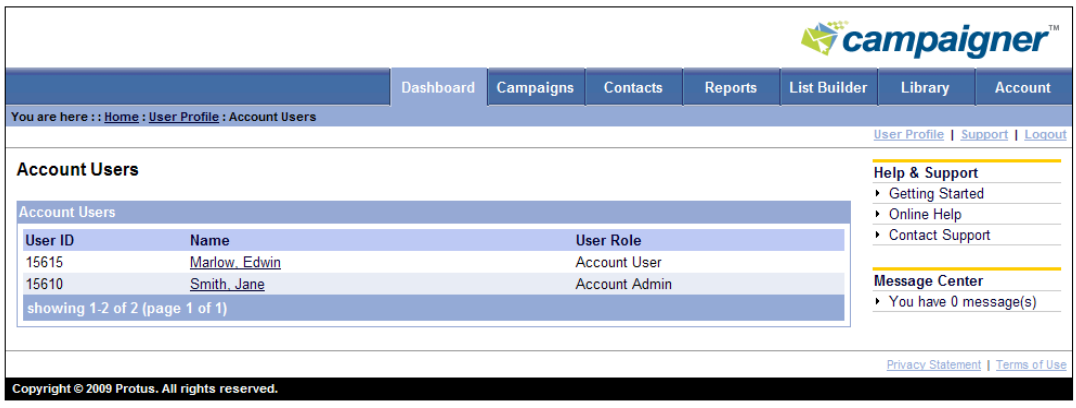
1. From the **User Profile** page, Account Administrators can click on the **Create Account User** Action.




2. Click **Create User** to submit the new user's information. A confirmation page is displayed.
3. Click **Yes** to continue. Click **Continue** to complete creation of the new user.

## Manage Account Users

1. From the **User Profile** page, Account Administrators can click on **List Account Users** Action. Select a user from the list in the **Account Users** page.

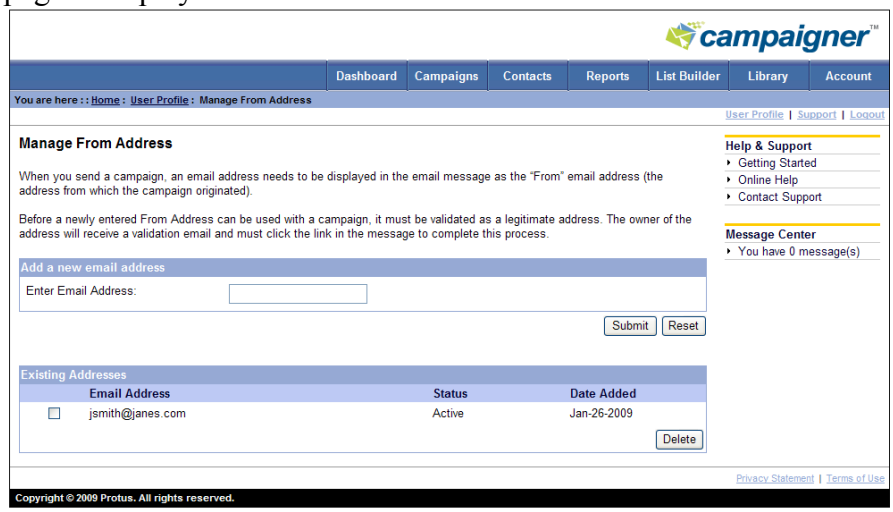



2. Click on the **Update Profile** Action, or
3. Click on the **Delete Profile** Action.

## Manage From Address

Multiple email addresses can be added to your account to be used as **From Addresses** in your email campaigns.

1. From the **User Profile** page, click the **Manage From Address** Action. The **Manage From Address** page is displayed.


campaigner
Dashboard
Campaigns
Contacts
Reports
List Builder
Library
Account
You are here : : Home : User Profile : Manage From Address
User Profile | Support | Logout
Manage From Address
When you send a campaign, an email address needs to be displayed in the email message as the "From" email address (the address from which the campaign originated).
Before a newly entered From Address can be used with a campaign, it must be validated as a legitimate address. The owner of the address will receive a validation email and must click the link in the message to complete this process.
Add a new email address
Enter Email Address:
Submit
Reset
Existing Addresses
Email Address
Status
Date Added
jsmith@janes.com
Active
Jan-26-2009
Delete
Help & Support
Getting Started
Online Help
Contact Support
Message Center
You have 0 message(s)
Privacy Statement | Terms of Use
Copyright © 2009 Protus. All rights reserved.

2. Enter a new **From Address** into the text box and click the **Submit** button.

   The new From Address will be added to the **Existing Addresses** list with a Status of **Pending**. A validation email will be sent to the From Address which contains a validation link. When the recipient of the validation email clicks the link, the From Address is considered validated and is available for use in email campaigns. Its status in the **Existing Addresses** list will change to **Active**.

3. To delete a **From Address**, select a checkbox in the **Existing Addresses** list and click the **Delete** button.

## Changing your Password

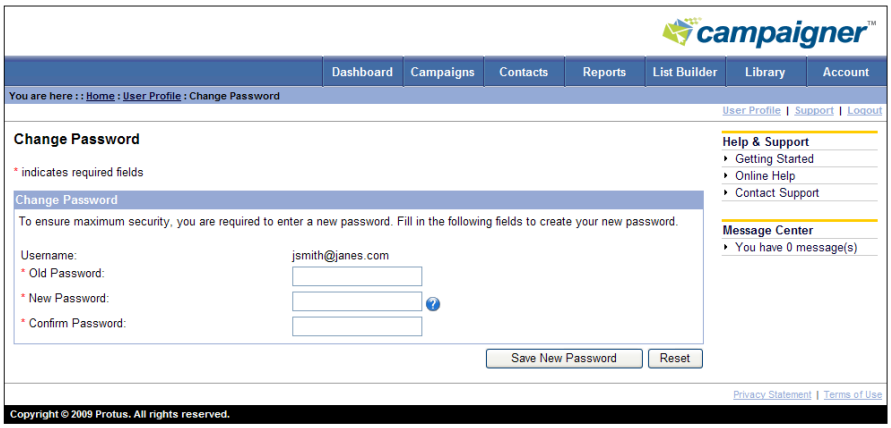
### Password Guidelines

To help protect your account, all passwords must follow these security guidelines:

- must be at least 6 and at most 20 characters long
- must contain at least 1 letter (**a-z, A-Z**), letters are case sensitive
- must contain at least 1 number (**0-9**)
- may contain any of **! @ # $ % ^ & * ( ) < > { } [ ] ; : ?** special characters
- may not contain any character except as listed above

**NOTE**: For SalesForce.com users, passwords have added security requirements and they must contain at least 1 special character as well as the above rules.

1. From the **User Profile** page, click the **Change Password** Action.

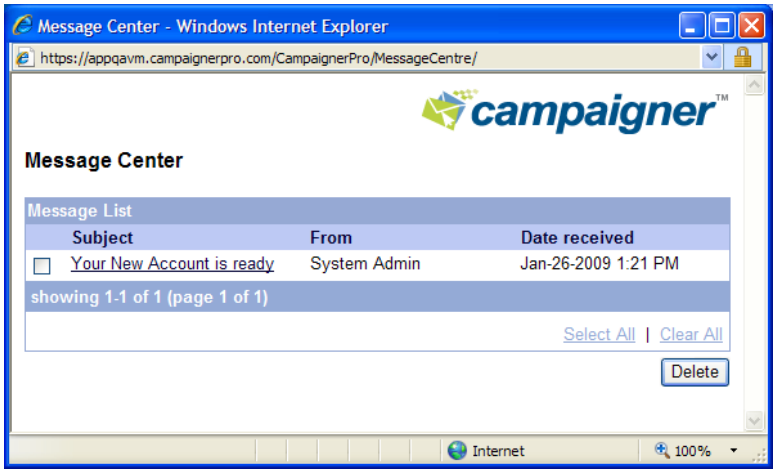



2. **Enter** your old and new passwords in the field provided.
3. **Click** the **Save New Password** button or click the **Reset** button to discard any changes.
4. If you cannot remember your old password, go to the Campaigner login page and click on the **Forget Your Password?** link.

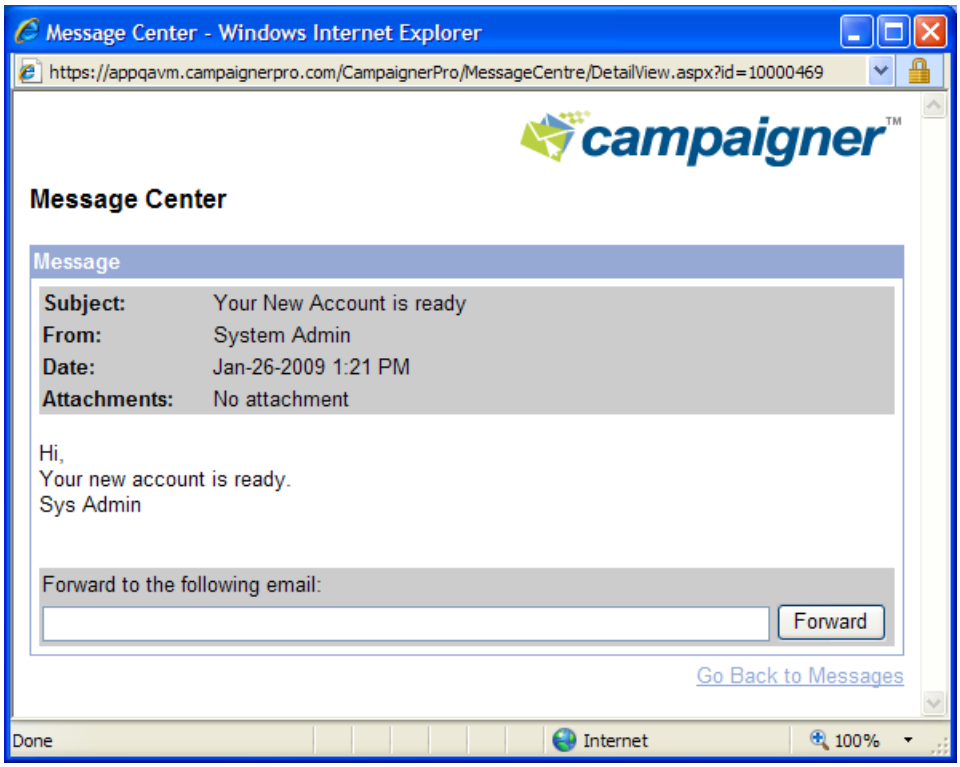
## Message Center

The **Message Center** contains account related messages. They may include attachments, action confirmations, information about the system, or details about your account usage. Messages will automatically be deleted from the **Message Center** after 90 days.

1. Click on **You have … message(s)** link in the **Message Center** menu.




2. Click on the message subject. Your message is displayed.




### View a message attachment

1. Click on the link **View Attachment**. The file download dialog box is displayed.
2. Click **Open** to view the attachment or **Save** to download it to your computer.

### Forward messages to email

1. Enter the email address in the **Forward to the following email:** textbox.
2. Click **Forward**. You will receive a confirmation message that the email has been forwarded.
   **Note:** If the message contains an attachment it will also be forwarded to the email address.

### Delete a message

1. Select the checkbox next to the message to be deleted or click **Select All** on the Message Center page. Click **Clear All** on the Message Center page to de-select all the checkboxes.
2. Click the **Delete** button.

## About Campaigner

Campaigner is an industry-leading email marketing service that makes it simple for small businesses and organizations new to email marketing to create sophisticated one-to-one email campaigns that result in profitable relationships with customers.

Campaigner's proven email marketing functionality includes list segmentation, personalized messaging, automation, and Salesforce integration. Campaigner improves email marketing ROI and performance by helping small businesses create and send professional e-newsletters, grow opt-in lists, and improve permission-based marketing results.

Campaigner includes automatic CAN-SPAM compliance and on demand online access for a low monthly fee.
Campaigner resources Campaigner offers a variety of educational materials for the public. Find recent articles, tips, online product and educational webinars, customer case studies, and more.

Additional information for Campaigner is available at www.campaigner.com.

Campaigner Support: 1-613-216-7422, Toll Free: 1-888-845-4544, Email: support@campaigner.com

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